



# REQUEST FOR PROPOSAL

FOR

National Supplier of  
Office Supplies

Date issued: 9 August, 2013

Solicitation File # : 201300278

Solicitation Closes: 2pm EDT 10  
September, 2013

Originating Department:  
Procurement Services

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Security Classification: PROTECTED

*Ce document est disponible en français sur demande*

## **1 SECTION 1 GENERAL INFORMATION**

### **1.1 Overview of Section 1**

The purpose of this section is to provide general information about CMHC and this Request for Proposal.

### **1.2 Introduction and Scope**

The Canada Mortgage and Housing Corporation (CMHC) wishes to enter into a Supply Agreement with a vendor (hereafter referred to as the “proponent”) to provide standard office supplies and various CMHC branded office supplies, as well as order fulfilment and distribution services to support CMHC’s activities on an as when required basis. CMHC will consider entering into a Supply Agreement with one proponent for a 3 year term with the option to renew the Agreement for an additional one (1) year period. The services will be required on a National basis. The supplier must be able to provide services in both official languages (English/French).

Canada Mortgage and Housing Corporation shall not be obligated in any manner to any proponent whatsoever until a written Agreement has been duly executed relating to a qualified, approved proposal.

More detailed specifications can be found in Section 3, “Statement of Work”.

### **1.3 CMHC Background**

CMHC is the Government of Canada’s National Housing Agency, with a mandate to help Canadians gain access to a wide choice of quality, affordable homes. It is a Crown corporation, with a Board of Directors, reporting to Parliament through the Minister of Employment and Social Development, and Minister responsible for Canada Mortgage and Housing Corporation, the Honourable Jason Kenney.

CMHC has more than 2,000 people located at its National Office in Ottawa, and at various Business Centres throughout Canada. The Business Centre areas are divided into five regions: Atlantic; Quebec; Ontario; British Columbia; and Prairies & Territories.

### **1.4 Purpose of Request for Proposal**

CMHC uses a Request for Proposal (RFP) to describe its requirements, ask suppliers for their proposed solutions, describe the criteria which will be used in evaluating proposals and selecting a lead proponent, and outline the terms and conditions under which the successful proponent will operate or supply goods and/or services. In an RFP process, proposals and proponents are evaluated in terms of ability to satisfy the stated requirements, while providing “Best Value” to CMHC in terms of price.

### 1.4.1 Service Providers

CMHC's contracting and procurement activities are decentralized among CMHC's National Office in Ottawa and various Business Centres throughout Canada.

The policy pertaining to the selection of suppliers is based on the principle that all suppliers must be treated fairly and equally. Suppliers are defined as an individual or firm that could provide, or has provided, goods or services or construction under contract.

CMHC utilizes the Supplier Information (SI) database, maintained by **Business Access Canada** as the Official CMHC source list. All proponents **must** be registered with **Business Access Canada** prior to submitting a proposal. The Procurement Business Number (PBN) provided by **Business Access Canada** must be included with your proposal. If you are not registered, and you wish to do so, you may access **Business Access Canada** (<https://buyandsell.gc.ca/>) or you may call their Information Line at: 1-800-811-1148. Present Suppliers not registered with Business Access Canada are required to self-register on the SI via the Business Access Canada Web site.

### 1.5 Schedule of Events

The following schedule summarizes significant target events for the RFP process. The dates may be changed by CMHC at its sole discretion and shall not become conditions of any contract which may be entered into by CMHC and the selected proponent.

Date	Activities
9 August 2013	Request for Proposal issued
2 September 2013	Submission of Questions Deadline
10 September 2013	Submission Deadline
October 2013	Evaluation and Selection of lead proponent
October 2013	Finalize Agreement with lead proponent
October 2013	Agreement award
October 2013	Announcement of successful proponent
As Requested	Debriefing to unsuccessful proponents

### 1.6 Mandatory Requirements

Throughout this RFP, certain requirements are identified as mandatory. A mandatory requirement is a minimum standard that a proposal must meet in order to be considered for further evaluation. Mandatory is defined as having substantial compliance as assessed by CMHC in its sole and absolute discretion.

Mandatory requirements are identified in:

- Section 2 Submission Instructions
- Section 4 Proposal Requirements
- Section 6 Proposed Contract, and

- Appendix A The Certificate of Submission.

**Caution:** Proposals which fail, in the sole discretion of CMHC, to meet any mandatory requirement will be eliminated from further consideration in the evaluation process. However, CMHC reserves the right to waive any mandatory requirements if it deems fit and appropriate to meet the interests of and provide best value to CMHC. This clause should be interpreted solely for the benefit of CMHC and not for the benefit of the Proponents.

## **1.7 Procurement Policy Re: The Environment**

CMHC fully supports the principle of sustainable development. Economic development and the preservation of the environment are given equal consideration to ensure that the actions of one generation do not compromise the ability of future generations to have an equal quality of life.

To this end, CMHC is dedicated to integrating sound environmental practices into its procurement practices.

## **1.8 Proponent Feedback**

CMHC aims to continuously improve its bid documents and procedures. CMHC welcomes input regarding proponent experience in responding to its RFPs, whether as a compliment or suggestion for future RFPs.

Proponents may submit comments labelled as ***Proponent Feedback RFP #201300278*** to the name and address provided in Section 2.4.

As CMHC does not wish to be perceived as influenced by such feedback in the award decision, proponents are requested to submit their feedback after the contract award has been announced.

Any proponent who notes a material flaw in the RFP that could affect the outcome should report it as specified in Section 2.4

## **1.9 Income Tax Reporting Requirement**

As a federal Crown Corporation, CMHC is obliged under the Income Tax Act and Regulations to report payments made by the Corporation to suppliers of goods and/or services by using a T1204 supplementary slip. CMHC must therefore obtain the necessary information from suppliers (including the Contractor's social insurance number and/or corporate identification number) in order to allow it to complete the T1204 supplementary slip. The Lead Proponent(s) will be required to complete and sign a Supplier - Direct Deposit and Tax Information Form (CMHC/SCHL 3085) prior to execution of this Agreement.

## 2 SECTION 2 SUBMISSION INSTRUCTIONS

## 2.1 Overview of Section 2

The purpose of Section 2 is to inform the proponent about CMHC's procedures and rules pertaining to this RFP process.

Proponents are advised that CMHC has provided as Appendix C a Mandatory Compliance Checklist for your benefit to complete prior to submission. This is to assist you in ensuring that you comply with all Mandatory criteria as non-compliance will result in disqualification.

## 2.2 Certificate of Submission

## Mandatory

The Certificate of Submission, Appendix A, summarizes some of the mandatory requirements set out in the RFP. It is a mandatory requirement that a proposal include a Certificate of Submission (or an accurate reproduction) signed by the proponent. Refer to Section 1.6 Mandatory Requirements.

Proponents must submit a signed Certificate of Submission as part of their proposal. Should a proponent not include the signed Certificate of Submission the proponent will be notified by CMHC and given 48 hours in which to meet this requirement.

### 2.3 Delivery Instructions and Deadline

Timely and correct delivery of proposals to the exact specified proposal delivery address is the sole responsibility of the proponent. All risks and consequences of incorrect delivery of proposals are the responsibility of the proponent. CMHC will not assume or have transferred to it those responsibilities. Proposals may be submitted in English or in French.

### Number of copies

One (1) signed original and three (3) copies of the complete proposal are to be submitted.

## Method of Sending

Proposals sent by facsimile machine or e-mail will not be accepted.

## Packaging and Address

Proposals, including all supporting documentation, are to be sealed. The outermost packaging of the proposal, including any courier or delivery packaging, must indicate all of the following information and be addressed exactly as follows:

**C1 Guard Station  
Canada Mortgage and Housing Corporation  
1st Floor, “C” Building  
700 Montreal Road  
Ottawa, Ontario K1A 0P7  
PROPOSAL CALL: National Supplier of Office Supplies, File No.: 201300278**

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**Submission Deadline****Mandatory**

Your proposal must be **received** at the exact location as specified above on or before the submission deadline set as:

**2:00 p.m. local Ottawa time (EDT), on September 10, 2013**

Proposals arriving late will be automatically rejected, and the sender will be so notified by e-mail.

**2.4 Inquiries**

All questions regarding this RFP must be sent by e-mail or facsimile to the following:

Patricia Howse, Procurement Advisor  
Email: [phowse@cmhc-schl.gc.ca](mailto:phowse@cmhc-schl.gc.ca)  
Fax No.: 613-748-2998

Information given verbally by any person within CMHC shall not be binding upon CMHC. Proponents must have written confirmation from CMHC for any changes, alterations, etc., concerning this RFP. CMHC cannot guarantee a reply to inquiries received less than **eight calendar days** (2 September 2013) prior to the closing date.

All written questions submitted, which in the opinion of CMHC affect all proponents, will be answered by CMHC in writing and distributed to all proponents by e-mail or GETS. All identification related to the inquiry will be removed in the response. Any questions of a proprietary nature must be clearly marked. CMHC will determine, at its sole discretion, whether it will respond to the question.

In the event that it becomes necessary to revise any part of the RFP as a result of any inquiry or for any other reason, an addendum to this RFP will be provided to each proponent to whom CMHC has issued this RFP by e-mail or GETS.

**2.5 Communication**

During proposal evaluations, CMHC reserves the right to contact or meet with any individual proponent in order to obtain clarification of its submission or to gain insight into the quality and scope of relevant services. A proponent will not be allowed to add, change or delete any information during this process. CMHC is in no way obliged to meet with any or all proponents for this purpose.

**2.6 Proponent Contact**

The proponent shall name a person in their proposal to act as a primary contact for CMHC during the evaluation period. A secondary contact should also be provided for backup purposes.

**2.7 Offering Period****Mandatory**

All responses must provide that the terms of the response including the pricing proposal, shall remain valid and binding on the proponent for a period of sixty (60) days following the closing date.

## **2.8 Changes to Submission**

Changes to the submitted proposal can be made, if required, provided they are received as an addendum to, or clarification of, previously submitted proposal, or as a complete new proposal to cancel and supersede the earlier proposal. The addendum, clarification, or new proposal must be submitted as per the delivery instructions outlined in Section 2.3, be clearly marked “**REVISION**”, and be received no later than the submission deadline. In addition, the revised bid must include a description of the degree to which the contents are in substitution for the earlier proposal.

## **2.9 Multiple Proposals**

Vendors interested in submitting more than one proposal may do so, providing that each proposal stands alone and independently complies with the instructions, conditions and specifications of this Request for Proposal.

## **2.10 Acceptable Alternative**

An alternative to any portion of a proposal may be submitted and must be in a separate addendum to the proposal.

An acceptable alternative is one which CMHC considers satisfactory in meeting a mandatory requirement. CMHC at its sole discretion will determine if a proposed alternative meets the intent of the original mandatory requirement.

## **2.11 Liability for Errors**

While CMHC has made considerable efforts to ensure an accurate representation of information in this RFP, the information contained in this RFP is supplied solely as a guideline for proponents. The information is not guaranteed or warranted to be accurate by CMHC, nor is it necessarily comprehensive or exhaustive. Nothing in this RFP is intended to relieve proponents from forming their own opinions and conclusions in respect of the matters addressed in this RFP.

## **2.12 Verification of Proponent's Response**

The proponent authorizes CMHC to conduct such investigation as it deems appropriate to verify the contents of the proponent's response.

## **2.13 Ownership of Responses**

All responses and related materials become the property of CMHC and will not be returned. CMHC will not reimburse the proponent for any work related to, or materials supplied in the preparation of the RFP response.

All information regarding the terms and conditions, financial and/or technical aspects of the proponent's proposal, which, in their opinion, are of a proprietary or confidential nature, must be clearly marked "**PROPRIETARY**" or "**CONFIDENTIAL**" at **each item** or at the **top of each page**. Proponents' documents and information so marked will be treated accordingly by CMHC. Notwithstanding the foregoing, proponents are advised that as a Crown corporation, CMHC is subject to the federal legislation with respect to access to information and privacy. Information submitted by third parties will be protected or may be required to be disclosed in specific circumstances pursuant to the federal legislation.

## **2.14 Proprietary Information**

Information contained in this RFP is to be considered "Proprietary Information" and the proponent is not to disclose this information to any party other than the proponent's employees or agents participating in the response to this RFP.

## **2.15 Corporation Identification**

The proponent agrees not to make any use whatsoever of CMHC's name, logo or initials, including public advertisement, without the express written consent of CMHC.

## **2.16 Declaration re: Gratuities**

In submitting its proposal, the proponent certifies that no representative for the proponent has offered or given a gratuity (e.g. an entertainment or gift) to any CMHC employee, Board member or Governor-in-Council appointee; and intended, by the gratuity, to obtain a contract or favourable treatment under a contract.

## **2.17 Conflict of Interest**

- (a) The Contractor and its principals, employees and agents shall avoid any conflict of interest during the term of this Agreement and shall immediately declare any existing, potential or apparent conflict and shall, upon direction of CMHC, take steps to eliminate any conflict or perception that a conflict of interest exists.
- (b) The Contractor must not provide any services to any third party in circumstances that might reasonably give rise to a conflict of interest, including a conflict between the Contractor's duties to that third party and the Contractor's duties to CMHC.
- (c) In the event that a conflict of interest, real or perceived, cannot be resolved to the satisfaction of CMHC, CMHC shall have the right to immediately terminate the Agreement. All portions of the Work which have been completed at the date of termination shall be forwarded to CMHC and CMHC shall be liable for payment to the Contractor of an amount which, in the sole opinion of CMHC, constitutes reasonable payment for the partial performance of the Contractor's obligations under the Agreement. Upon such payment, CMHC shall have no further obligation of any nature or kind to the Contractor.



- (d) Any former public office holder must be in compliance with the post-employment provisions of the Conflict of Interest and Post-Employment Code for Public Office Holders (2012) in order to derive a direct benefit from any contract which may arise from this request for proposal.

## **2.18 Declaration re: Bid Rigging and Collusion**

In submitting its proposal, the proponent certifies that:

- (a) prices as submitted in its proposal have been arrived at independently from those of any other proponent;
- (b) the prices as submitted have not been knowingly disclosed by the proponent, and will not knowingly be disclosed by the proponent prior to award, directly or indirectly, to any other proponent or competitor; and
- (c) no attempt has been made, nor will be made, to induce any other person to submit, or not to submit, a proposal, for the purpose of restricting competition.

## **2.19 Security Clearance**

CMHC requires employees of the selected proponent to be security cleared in order to permit them access to CMHC premises when and if required. This process normally takes approximately 5 working days. If they are not security cleared, the proponent or its employees will require an escort by a CMHC employee while in CMHC premises and will not be granted access to CMHC information and systems.

## **2.20 Shortlist**

The evaluation procedure will include a shortlisting of the top three (3) proponents. The shortlisted proponents will be asked to provide a demonstration of their electronic ordering system including the ordering of branded items, and a demonstration of their electronic reporting functions including but not limited to quarterly reports, invoice reports etc. CMHC reserves the right to supply more information to those proponents who are shortlisted.

## **2.22 Joint Venture Responses**

Joint venture proposals should adequately represent and communicate the proposed participation and responsibilities of each company in the joint venture, and must provide a description of the proposed joint venture business arrangement which would be entered into by all parties upon receipt of a contract. The description must list the companies involved, indicate how long the business arrangement has been in existence, indicate the service(s) each respective party would be providing and describe the proposed participation and responsibility of each party.

The proponent shall designate one of the partners as the contact person through whom any communication between the proponent and CMHC will be channelled during the RFP process.

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Joint venture responses must be accompanied by a signed Certification of Submission from each participating company. Refer to Section 2.2.

## **2.23 Intellectual Property Rights**

All material, reports and other work product produced under this (RFP and the resulting) Agreement will be the sole property of CMHC. The Contractor warrants that the Contractor is the only person who has or will have moral rights in the material created by the Contractor and supplied under this Agreement and the Contractor hereby waives in favour of CMHC all of the Contractor's moral rights in the material, as provided for in the law of copyright. Upon the material coming into existence, the Contractor agrees to execute any document requested by CMHC acknowledging CMHC's ownership of the material and work product and the waiver of the Contractor's moral rights therein.

## **2.24 Non-Disclosure of CMHC Information**

Under this section, "CMHC Information" refers to any and all information which is managed, accessed, collected, used, disclosed, retained, received, created or disposed of in order to fulfil the requirements of the Contract, however obtained. Without limiting the generality of the foregoing, CMHC Information includes data held in any type of electronic format and information provided directly, indirectly or through third parties to the Contractor, any subcontractor, reseller, agent or any other person engaged to perform the Work under the contract.

The Contractor acknowledges and understands that all CMHC Information is subject to Canadian laws on privacy and access to information under which CMHC is bound and that CMHC considers CMHC information to be under its custody and control at all times.

The Contractor further understands and agrees to treat all CMHC Information as proprietary, confidential and sensitive unless otherwise specifically agreed to in writing by CMHC. The Contractor shall restrict access to CMHC Information to those person who have a need to know this information in order to perform the Work under the Contract.

The Contractor shall ensure that CMHC Information shall remain in Canada and expressly agrees to segregate CMHC Information (whether in electronic format or in hard copy) from any other information in a database or repository physically independent from all other databases or repositories. Without limiting the generality of the foregoing, the Contractor shall not and shall ensure that any subcontractor, reseller, agent or any other person engaged to perform any part of the Work does not release, share or otherwise divulge CMHC Information to any other person including subsidiaries, branch offices, partners of the Contractor or subcontractors without the prior written consent of CMHC.

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### **3 SECTION 3 STATEMENT OF WORK**

#### **3.1 Overview of Section 3**

This section of the RFP is intended to provide the prospective proponent with the information necessary to develop a competitive proposal. The Statement of Work is a complete description of the tasks to be done, results to be achieved and/or the goods to be supplied

#### **3.2 Mandatory Requirements**

A mandatory requirement is a minimum standard that a proposal must meet in order to be considered for further evaluation.

Any mandatory requirements associated with the Statement of Work are clearly identified in Section 4 - Proposal Requirement.

The Mandatory Compliance Checklist is located at Appendix C.

#### **3.3 Background Information**

The Canada Mortgage and Housing Corporation (CMHC) wishes to enter into a Supply Agreement with a vendor (hereafter referred to as the “proponent”) to provide standard office supplies and various CMHC branded office supplies, as well as order fulfillment and distribution services for both standard and branded office supplies to support CMHC’s activities on an as-required basis. CMHC will consider entering into a Supply Agreement with one proponent, for the provision of the services identified within this RFP. The services will be required on a National basis. The supplier must be able to provide these services in both official languages (English/French).

Supplier must be capable of providing office supplies and arranging delivery services on a national basis to five Regions (Atlantic, Quebec, Ontario, British Columbia, and Prairies & Territories) and approximately thirty-two (32) CMHC office locations across Canada and one (1) location at the National Office complex located at 700 Montreal Road. CMHC’s internal distribution unit will distribute the goods to the order points at the National Office complex. Supplies will be ordered by an estimated one hundred (100) CMHC Order Points located across Canada on an as required basis and will be placed either through electronic/internet or by telephone.

#### **3.4 Performance Requirements                      Mandatory**

In the event of an Agreement, it will be mandatory that the successful proponent be able to accommodate each of the following requirements:

- a) Back orders are to be kept to a minimum and must be filled promptly. Proponents must indicate their average length of time for filling back orders and any processes or mechanisms they have in place to minimize them.

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- b) Proponents must be capable of arranging "rush/urgent" (ie; less than 24 hours) orders. Please describe how you will accommodate these "rush" orders in your proposal as well as any costs associated with said orders.
  - c) Product discrepancies will be reported to the successful Proponent within 24 hours. These discrepancies are to be rectified by the Proponent within 48 hours. Please describe how you will handle product discrepancies.
  - d) Proponents are to describe their standard return, exchange, and credit policies.
  - e) CMHC reserves the right to accept or reject alternative items. The Proponent may be requested to make a sample available and explain any advantages or disadvantages for evaluation purposes.
  - f) Proponents' electronic ordering system must be able to interface with CMHC systems, set financial and quantity purchase limits by order point, and be capable of blocking purchases. CMHC utilizes Microsoft Internet Explorer version 8.0. Proponent must describe their proposed electronic ordering system for placing orders, and it's compatibility with Microsoft Internet Explorer version 8.0
  - g) Indicate the degree to which CMHC employees would have access to your company's software to verify the status of an order, manage their spending activities and individual budget drawdown's including tracking remaining budget funds available.
  - i) The successful Proponent must have bilingual (English/French) customer service staff capable of working with various order points. Please elaborate on how you will accommodate this requirement in both official languages.
  - j) Proponents must indicate what warranties and/or guarantees are being provided by the manufacturers and what warranty is provided by the Proponent that are over and above those offered by the manufacturer of the various products being sold.
  - k) Branded Product Selection:

Proponents will be required to provide a range of branded products within the following 7 categories

- 1) Agenda/Desk Planner/Calendars
- 2) Pens/pencils/highlighters
- 3) Notebooks/Portfolios
- 4) Notebook sleeves/briefcases
- 5) Calculators/Desk organizers, etc.
- 6) Mouse pads
- 7) Names badges with magnet back/CMHC lapel pins

The proponent will not fulfill any orders or branded office supplies if they are not within the above 7 categories.

A pricing ceiling has been established at \$25.00 per item (excluding tax). Any per unit item ordered within the above 7 categories shall not exceed \$25.00 (excluding tax).

Proponents must provide a complete sample of products via bilingual (English/French) catalogue showing pictures of the products, descriptions, which will be used by CMHC's employees to place their individual orders.

- l) Proponents are required to describe their commitment to staying proactive in working with CMHC on continually looking for cost-cutting and business improvement initiatives.

### **3.5 Delivery of Products and Service**

#### **Mandatory**

The following requirements are critical to the successful execution of the Office and Branded Office Supplies Agreement and must be agreed to by the successful Proponent. The delivery of products and service in the following locations National Office in Ottawa, Atlantic, Quebec, Ontario, British Columbia, and Prairies & Territories are required.

- a) Minimum Orders: CMHC will not be obliged to place minimum quantity or dollar value orders.
- b) Fill Rate: The successful Proponent is expected to maintain a fill rate of at least 98% of all products ordered.
- c) Delivery Lead Time: A delivery time longer than forty-eight (48) hours is unacceptable to CMHC. Proponents must specify they can meet a delivery lead time of not more than 48 hours from placement of order to receipt of goods.
- d) Environmentally Sound Products: The Proponent shall indicate what percentage of its catalogued products are currently "Green" products. Proponents are to describe their "Green" policy, including their integration and use of recyclable materials, packing materials or other products commonly used and or sold in their day-to-day operations.
- e) Electronic Invoices and Reports: Proponents must be capable of providing electronic invoices and reports customized to meet CMHC's requirements. Proponents are to provide details on their capability of providing customized invoices and reports. Examples of information required in such electronic invoices and reports are provided below:
  - Monthly Invoice and Reports:  
One monthly invoice showing the balance of all accounts, detailing all credits, detailing all order point information including a tax summary report, indicating GST/HST and PST for all provinces year to date totals.

➤ **Quarterly Reports:**

One master quarterly report, indicating the total usage by all order points. The report is to indicate order point usage by product and dollar value.

- Additional reports such as discrepancy, back order rates and customer service concerns are to be prepared and delivered as requested.

**Proponents are to provide samples of invoices and reports as part of their proposal, highlighting the example information as indicated above.**

- f) Delivery Times: The proponent must specify typical delivery turn around times for the designated order points across Canada (this would not include back orders) and their ability to ensure consistent service across the country.

Proponents must describe their order processing and fulfillment procedures including related quality assurance processes.

- g) Client Service: Proponents must have bilingual client service staff that is available to assist CMHC order point contacts over the telephone. Proponents must describe their ability to meet this requirement.

- h) Branding: All applications of the CMHC logo and identity must be consistent with CMHC's established branding guidelines (see [cmhc.ca/branding](http://cmhc.ca/branding) or [schl.ca/imagedemarque](http://schl.ca/imagedemarque)).

Proponents must describe their branded item order processing and fulfillment procedures and outline how they will ensure CMHC'S branding guidelines are always followed.

- i) Warrantees: Proponents must indicate what warranties are provided by the proponent that is over and above those offered by the manufacturers of the various products being sold. Clearly indicate any limitations, exceptions or conditions that would void any of the warranties and/or guarantees.

### **3.6 Implementation Strategy**

The proponent is to describe their implementation strategy should they be the successful proponent.

- a) Describe how order points will be notified and trained on the ordering system for both office supplies and branded office supplies.
- b) Describe how bilingual communication between order points and the proponent will take place including information on the regional contacts.
- c) CMHC requires one (1) administrator access to the proponents system; describe how this access will differ from that of the order points including functionality differences.

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## **4 SECTION 4 PROPOSAL REQUIREMENTS**

### **4.1 Overview of Section 4**

Proposal responses are to be organized and submitted in accordance with the instructions in this section. Responses should be organized into the following Response Item sections.

Response Item
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#	Item
4.3	Covering Letter
4.4	Table of Contents
4.5	Proponent's Qualifications
4.6	Response to Statement of Work
4.7	Financial Information
4.8	Pricing Proposal

Elaborate or unnecessarily voluminous proposals are not desired. Proponents are encouraged to take care in completely answering questions and proposal requirements and to avoid submitting extraneous materials that do not show how the proponent intends to meet requirements.

Requirements for each Response Item are detailed below.

### **4.2 Mandatory Proposal Requirements**

Certain requirements in section 4 are identified as mandatory. See Section 1.6 Mandatory Requirements.

### **4.3 Covering Letter**

A covering letter on the proponent's letterhead shall be submitted and include the following:

- (a) A description of the company or joint venture/consortium.
- (b) The names of the principals.
- (c) The primary contact person with respect to this RFP: the individual's name, address, contact numbers by phone and fax, and contact e-mail address, if available.
- (d) The locations of primary and all other offices that would be servicing the contract.

### **4.4 Table of Contents**

The proponent shall include a table of contents using the response item headings and numbering system identified in this section of the RFP. The response should be paginated for easy referencing by the evaluation committee.

#### **4.5 Proponent's Qualifications**

#### **Mandatory**

The proponent's proposal should include information about the proponent's qualifications as follows:

- (a) References: A list of three (3) contracts of a similar size and scope which the proponent currently holds or has held. For each contract, the proponent must specify: company name and address; contact person name and phone number. CMHC may approach any such contact person for information relating to the quality of work provided by the proponent.
- (b) Information about office location(s): If awarded this Agreement, which office would provide support services? Which offices/warehouses would service each of the Regional Offices?

#### **4.6 Response to Statement of Work**

#### **Mandatory**

In this section, the proponent should provide detailed information relative to the specifications listed in Section 3, The Statement of Work.

Proponents are to demonstrate and expand upon their company's experience and capabilities of providing office and branded office supplies on a national scale to multiple locations including but not limited to:

#### **Performance Requirements**

Proponents must respond to all items identified in Section 3.4, Performance Requirements. Describe in detail how the Proponents' company will address the itemized requirements and, if so desired, provide examples of how this has been accomplished in other, similar contracts.

#### **Delivery of Products and Service**

Proponents must respond to all items identified in Section 3.5 Delivery of Products and Service. Describe in detail, how the Proponents' company will provide each line item and to what extent they will be provided. Provide examples of how this has been accomplished in other, similar contracts.



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## **Warranties**

Proponents must indicate what warranties and/or guarantees are being provided by the manufacturers and what warranty is provided by the Proponent that are over and above those offered by the manufacturer of the various products being sold. Clearly indicate any limitations, exceptions or conditions that would void any of the warranties and/or guarantees. State the length of the warranty period and whether warranty service is provided on-site

The Proponent is also to provide their invoice and report samples as outlined in Section 3.5.

### **4.7 Financial Information**

### **Mandatory**

#### **4.7.1 Credit Check**

Sole proprietorships and partnerships must provide a statement contained within their proposal giving written permission for CMHC to perform a credit check as required.

### **4.8 Pricing Proposal**

### **Mandatory**

Proponents must provide their firm prices in the Products List attached to this RFP as Appendix D. Also, proponents must provide a discount percentage schedule for the office products within the proponent's catalogue.

Proponents' discounts shall be expressed as a percentage off the unit list prices as stated within the proponents' catalogue, exclusive of all taxes and/or delivery charges.

- Discount off List Price Items
- Discount off Market Price Items
- Discount off Furniture Items
- Discount off Facility Price Items
- Miscellaneous Discounts or Rebates Offered
- Delivery Costs

All prices and amounts of money in the proposal are to be quoted in Canadian dollars and be exclusive of the Goods and Services Tax (GST), Harmonized Sales Tax (HST), and Provincial Sales Tax (PST), as applicable, unless otherwise indicated. The GST, HST or PST, whichever is applicable, shall be extra to the price quoted by the proponent and will be paid by CMHC.

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## **SECTION 5 EVALUATION AND SELECTION**

### **5.1 Overview of Section 5**

Section 5 describes the process CMHC will use to evaluate proposals, select a lead proponent and finalize and sign a contract.

**The lowest cost or any proposal will not necessarily be accepted and CMHC reserves the right to accept or reject any or all proposals in whole or in part.**

CMHC reserves the right to alter the stated requirements as needs require and to accept an alternate proposal included in any proponent's response.

CMHC shall conduct the RFP process in a visibly fair manner and will treat all proponents equitably. To this end, it has established objective RFP standards and evaluation criteria which will be applied uniformly to all proponents. Therefore, no proponent shall have any cause of action against CMHC arising out of a failure to award a contract, the failure to evaluate any proposal, or the methods by which proposals are assessed.

### **5.2 Limitation of Damages**

The proponent, by submitting a proposal, agrees that it will not claim damages in excess of an amount equivalent to the reasonable costs incurred by the proponent in preparing its proposal for matters relating to the agreement or in respect of the competitive process, and the proponent, by submitting a proposal, waives any claim for loss of profits if no agreement is made with the proponent.

### **5.3 Evaluation Table**

The Evaluation Table as provided in Appendix "B" lists all the criteria upon which each proposal will be evaluated. The criteria are based on the requirements as provided in this RFP.

### **5.4 Evaluation Methodology**

Each proposal will be examined to determine compliance with each mandatory requirement identified in this RFP. A proposal must comply with all of the mandatory requirements in order to proceed in the evaluation process. A proposal which is deemed by CMHC to be non-compliant in one or more mandatory requirements will be eliminated from further consideration. A proposal which meets all the mandatory requirements will be deemed compliant and will proceed in the evaluation process.

Each compliant proposal shall be individually evaluated by each member of the Evaluation Committee, made up of qualified personnel. Evaluators shall evaluate and numerically score each proposal in accordance with the evaluation criteria as shown in the Evaluation Table, Appendix "B". Once individual evaluations are complete, the Evaluation Committee will discuss and agree upon a final score, without pricing element, for each proposal.

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A proposal must meet the minimum upset score in each category (as shown on the Evaluation Table) to remain in the evaluation.

In evaluating the pricing proposal, the percentage discounts provided will be applied to the prices of a random sample of products taken from the respective proponent's catalogue. The Proponent with the lowest cost for the sample group of items of equal quality will obtain the highest score under price response in Appendix B Evaluation Table. All other, more expensive proposals, will receive fewer points on a pro-rata basis. Each Proponent's Pricing Proposal score will then be added to their other evaluation criteria scores in order to determine the overall score for each proponent.

The top three (3) Proponents with the highest overall scores will be shortlisted and will be invited to provide a demonstration of their electronic ordering system including a demonstration of ordering branded items, and a demonstration of their electronic reporting functions including but not limited to quarterly reports, invoice reports etc. This electronic system demonstration will be evaluated in terms of functionality, and consistency with the information submitted in the proposal. Initial scores may be adjusted based on the results of the demonstration. The final overall scores for each proponent will then be confirmed and the proponent with the highest overall score will be deemed to be the lead proponent with whom CMHC will enter into negotiations.

## **5.5 Financial Evaluation**

CMHC reserves the right to carry out a credit check on the lead proponent before beginning contract discussions. This is a pass/fail test. Pass means that contract discussions begin. Fail means that the lead proponent may not enter into contract discussions and is disqualified from further consideration.

## **5.6 Proponent Selection**

Acceptance of a proposal does not oblige CMHC to incorporate any or all of the accepted proposal into a contractual agreement, but rather demonstrates a willingness on the part of CMHC to enter into negotiations for the purpose of arriving at a satisfactory contractual arrangement with one or more parties.

Without changing the intent of this RFP or the lead proponent's proposal, CMHC will enter into discussions with the lead proponent for the purpose of finalizing the contract. If at any time CMHC decides that the lead proponent cannot satisfy CMHC's requirements, CMHC may terminate negotiations. If at this time CMHC feels that the secondary proponent may meet the requirements, CMHC will continue the process with the secondary proponent and so on.

Announcement of the successful proponent will be made to all proponents following the signing of a contract.

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## **6 SECTION 6 PROPOSED CONTRACT**

### **6.1 Overview of Section 6**

Attached in Section 6.3 is a proposed contract. The terms and conditions in this draft contract may be incorporated into any contract resulting from this RFP. CMHC reserves the right to add terms and conditions during negotiations. These terms and conditions will be within the scope of the RFP and will not affect the proposal evaluations.

The proponent's proposal and all associated correspondence from the proponent, where relevant, shall to the extent desired by CMHC form part of the final contract and the proponent must accept that the final contract form will be in a format acceptable to CMHC.

Submission of a proposal constitutes acknowledgement that the proponent has read and, unless otherwise stated in the proponent's proposal (including a declaration in the attached draft contract of any potential conflicts of interest), agrees to be bound by the terms and conditions in the draft contract in Section 6.3 in the event that the proponent is selected by CMHC to enter into a contract agreement.

For the purposes of this section the term "Contractor" refers to the successful proponent with whom CMHC enters into a contract agreement.

### **6.2 Mandatory Contract Terms and Conditions**

The terms, conditions or sections of the draft contract in Section 6.3 that are labelled mandatory must be accepted by the proponent without alteration.

### **6.3 Proposed Contract**

**The attached proposed contract forms Section 6.3 of this RFP.**

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**PROPOSED CONTRACT**

**CMHC FILE No.** \_\_\_\_\_

**THIS AGREEMENT** made this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_.

**BETWEEN**

CANADA MORTGAGE AND HOUSING CORPORATION  
National Office  
700 Montreal Road  
Ottawa, Ontario, Canada  
K1A 0P7

(hereinafter referred to as "CMHC")

**AND**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

(hereinafter referred to as "the Contractor")

**WITNESSES THAT** in consideration of the respective covenants and agreements hereinafter contained, CMHC and the Contractor mutually covenant and agree as follows:

**Article 1.0 - The Work**

**1.1** The Contractor covenants and agrees to provide standard office supplies and various CMHC branded office supplies, as well as order fulfilment and distribution services to support CMHC's activities on an as when required basis.

**1.2** All CMHC office sites are to be serviced. A complete list is provided in the RFP and shall form part of this Agreement.

**Article 2.0 - Term of the Agreement**

**2.1** This agreement shall be for an initial period of three (3) years commencing on \_\_\_\_\_ and ending on \_\_\_\_\_. CMHC may renew this agreement for an additional one (1) year period not to exceed a cumulative total of four (4) years including initial period.

**2.2** Notwithstanding article 2.1 above, CMHC may conduct on an annual basis, an assessment of the Contractor's work performed for the past year. Based on this assessment, CMHC may advise the Contractor in writing of their decision to continue or terminate the Agreement.

### **Article 3.0 - Financial**

**3.1** In consideration of the carrying out of the work, as described in Article 1.0, CMHC agrees to pay the Contractor an amount based on the Contractor's pricing and discount schedule provided as part of their proposal. The discount schedule will form part of the Agreement and must be fixed for the initial three (3) year term of the Agreement.

**3.2** The amount payable to the Contractor by CMHC pursuant to article 3.1 is inclusive of all taxes, assessments, duties or other levies that may be payable under this Contract to the Contractor, including any goods and services tax/harmonized sales tax (GST/HST) or retail sales tax (RST). No taxes, assessments, duties or other levies shall be payable to the Contractor in addition to the amount payable pursuant to article 3.1 unless specifically agreed to between the Contractor and CMHC.

**3.3** Notwithstanding article 3.2 above, GST/HST or RST, to the extent applicable and required to be collected by the Contractor, shall be collected by the Contractor on the consideration due and shown as a separate item on an invoice. Where the Contractor is required to collect the GST/HST, the invoice issued by the Contractor shall show the Contractor's GST/HST number. Where the Contractor is also required to collect the Quebec Sales Tax (QST), the invoice shall show the QST number. The Contractor shall duly remit to the Canada Revenue Agency any amounts of GST/HST collected on the consideration payable pursuant to this Contract. The Contractor shall remit to the appropriate provincial taxing authorities any amounts of RST or QST collected by the Contractor from CMHC pursuant to this Contract.

**3.4** Invoicing - The Contractor must allow 30 days from delivery of invoice for payment without interest charges. The Contractor cannot invoice prior to performance of the service or delivery of the goods.

### **3.5 Method of Payment**

All payments due under the Agreement will be made by means of Electronic Funds Transfer ("EFT"). The Contractor is responsible for providing CMHC with all the information set out in section 3.6 to allow EFT to be effected and for keeping the information up to date. In the event that CMHC is unable to make payment by EFT, the Agreement agrees to accept payment by cheque or another mutually agreeable method of payment.

### **3.6 Direct Deposit and Income Tax Reporting Requirement**

As a federal Crown Corporation, CMHC is obliged under the Income Tax Act and Regulations to report payments to suppliers of goods and/or services by using a T1204 supplementary slip. CMHC must therefore obtain the necessary information from suppliers, including the Contractor's social insurance number and/or corporate identification number, in order to allow CMHC to make payment by EFT and to complete

the T1204 supplementary slip. The Contractor is required to complete and sign a Supplier - Direct Deposit and Tax Information Form (CMHC/SCHL 3085) prior to commencement of the Term. Throughout the Term, the Contractor is required to ensure that the information provided remains accurate and up to date. The Contractor assumes full responsibility for any errors in payments or tax reporting that arise because the information supplied is inaccurate or out of date.

**3.7 Audit** - The Contractor shall maintain proper records and accounts during the term of the Agreement and for a period of three (3) years following the end of the term and any renewals thereof. The Contractor agrees to allow CMHC's internal and external auditors the right to examine, at any reasonable time, any and all records relating to the services identified herein

The Contractor agrees to provide the Corporation's internal or external auditors with sufficient original documents in order to conduct any audit procedures. Any audit may be conducted without prior notice, however the Corporation agrees to cooperate with the Contractor in the course of conducting any audit in order to avoid disruption in day-to-day operations and not to break confidentiality.

**3.8** All invoices, notices and requests for payment must make reference to this contract by quoting **CMHC file number 201300278** and be forwarded to CMHC at the following address:

**Canada Mortgage and Housing Corporation**

**Name** \_\_\_\_\_

**Title** \_\_\_\_\_

**Room** \_\_\_\_\_

**700 Montreal Road**

**Ottawa, Ontario**

**K1A 0P7**

## **Article 4.0 - General Terms and Conditions**

### **4.1 Contract Termination**

Notwithstanding articles 2.1 and 2.2 above, CMHC may terminate the contract for any reason with no penalty by giving thirty (30) days written notice, at any time during the contract period.

Upon termination of this Contract or upon delivery of notice of intent to terminate this Contract, the Contractor shall promptly review all work in progress and, if this Contract is terminated prior to the expiry of the term, the Contractor shall nevertheless complete or arrange for the completion of any and all work in process at the time of termination.

### **4.2 Contract Administrator**

CMHC has assigned a contract administrator to oversee the contract (see article 5.1). The Contractor shall be expected to name a counterpart representative. The Contractor's representative will be responsible for providing scheduled status reports to the contract administrator or a designate.

#### **4.3 Assignment of the Contract**

#### **Mandatory**

The Contract shall not be assigned in whole or in part by the Contractor without the prior written consent of CMHC, which consent may be withheld by CMHC for any reason. It is understood and agreed that the Contractor may engage other entities to assist the Contractor in providing any of the Services, provided that the Contractor shall at all times remain responsible for the provision and quality of the Services in a manner which fully recognizes and respects the confidential nature of the Services. The Contractor undertakes to advise such entities in writing that they are independent contractors, and are not employees or agents of CMHC. No assignment of the contract shall relieve the Contractor from any obligation under the Contract or impose any liability upon CMHC.

#### **4.4 Contractor's Indemnification**

The Contractor agrees to indemnify CMHC, and its officers for all loss, damages, costs, expenses, claims, demands, actions, suits or other proceedings of every nature and kind arising from or in consequence of the performance of this agreement, provided such loss, damages, costs, expenses, claims, demands, actions, suits or proceedings arise without negligence on the part of CMHC or its officers or employees, and whether such actions, suits or proceedings are brought in the name of CMHC or in the name of the Contractor.

#### **4.5 Liquidated Damages**

No specific remedy expressed in the Contract is to be interpreted as limiting the rights and remedies which CMHC may be entitled to under any contract or otherwise in law.

#### **4.6 Termination for Default of Contractor**

Notwithstanding anything to the contrary in this document, CMHC may, by giving 10 days prior written notice to the Contractor, terminate this contract without charge with respect to all or any part of the contract for any of the following reasons:

1. The Contractor commits a material breach of its duties under this contract, unless, in the case of such breach, the Contractor, within thirty (30) calendar days after receipt of written notice of such breach from CMHC, in a manner satisfactory to CMHC in its sole, absolute and non-reviewable discretion, (a) cures such breach and (b) indemnifies for any resulting damage or loss;
2. The Contractor commits numerous breaches of its duties under this contract that collectively constitutes a material breach;



3. A change in control of the Contractor where such control is acquired, directly or indirectly, in a single transaction or series of related transactions, or all or substantially all of the assets of the Contractor are acquired, by any entity, or the Contractor is merged with or into another entity to form a new entity, unless the Contractor demonstrates to the satisfaction of CMHC that such event will not adversely affect its ability to perform the services under this contract;

4. The Contractor commits fraud or gross misconduct; or

5. The Contractor becomes bankrupt or insolvent, or a receiving order is made against the Contractor, or any assignment is made for the benefit of the creditors, or if an order is made or a resolution passed for the winding up of the Contractor, or if the Contractor takes the benefit of any Statute for the time in force relating to bankrupt or insolvent debtors.

In the event of a termination notice being given under the provisions of this section, and subject to the deduction of any claim which CMHC may have against the Contractor arising out of the contract or out of termination, payment will be made within thirty (30) days of the date of the invoice from CMHC to the Contractor for the value of all finished work delivered and accepted by CMHC, such value to be determined in accordance with the rate (s) specified in the contract.

#### **4.7 Procedures on Termination**

Commencing upon any notice of termination or non-renewal of this contract, the Contractor shall provide to CMHC, the reasonable termination /expiration assistance requested by CMHC to allow the services to continue without interruption or adverse effect and to facilitate the orderly transfer of the services to CMHC or its designee.

#### **4.8 Non-Compliance or Default by Contractor**

If the Contractor fails to comply with a direction or decision of CMHC properly given under the terms of the agreement, or is in default in any other manner under the Contract, CMHC may do such things and incur such costs as it deems necessary to correct the Contractor's default, including without limitation the withholding of payment due or accrued due to the Contractor for services rendered pursuant to this Contract, which moneys may be set off by the Corporation against any expenses that it may incur in remedying a default or failures as described above.

#### **4.9 Force Majeure**

In the event that the Contractor is prevented from fulfilling its obligations under the terms of this agreement by a force majeure or act of God (an event or effect that cannot be reasonably anticipated or controlled), the Contractor shall notify CMHC in writing, within the shortest period of time. The said written notice shall be sent by registered mail and shall state the factors that constitute a force majeure or an act of God. Without limiting the application of the above, the following shall constitute cases of force majeure: war, serious public disturbances, all impediments arising from orders or prohibitions of public authority, acts of God, actions of

public enemies, strikes, lockout and other labour disputes, riots, flooding, hurricane, fire, explosion or any other natural disasters over which the Contractor has no reasonable control.

The Contractor shall take all reasonable means to resume fulfillment of its obligations. If this is not possible, CMHC may to the extent it deems necessary secure the services of other qualified Contractors without compensation or obligation to the Contractor.

#### **4.10 Compliance With Laws**

The Contractor shall give all the notices and obtain all the licenses and permits required to perform the work. The Contractor shall comply with all the laws applicable to the work or the performance of the contract.

#### **4.11 Provincial Laws Governing Agreement**

This contract shall be governed by and construed in accordance with the laws of the Province of Ontario and the laws of Canada applicable therein. Failure by either party to assert any of its rights under the agreement shall not be construed as a waiver thereof.

#### **4.12 Independent Contractor**

The Contractor shall act as an independent contractor for the purposes of this contract. It and its employees, officers and agents are not engaged as employees of CMHC. The Contractor agrees to so advise its employees, officers, and agents. Without limiting the generality of the foregoing, the Contractor shall retain complete control of and accountability for its employees and agents. The Contractor shall prepare and process the payroll for its employees directly, and shall withhold and/or pay all applicable employment taxes and payroll deductions required in respect of its employees. All personnel shall, at all times, and for all purposes, be solely in the employment of the Contractor.

#### **4.13 Contractor's Authority**

The Contractor agrees that it has no authority to give any guarantee or warranty whatsoever expressed or implied on behalf of CMHC and that it is in no way the legal representative or agent of CMHC and that it has no right or authority to create any obligation on behalf of CMHC or to bind CMHC in anyway.

#### **4.14 Corporation Identification**

It is agreed that the Contractor will make no use whatsoever of CMHC's name, logo or initials without the express written consent of CMHC

#### **4.15 Non-Disclosure of CMHC Information**

Under this section, "CMHC Information" refers to any and all information which is managed, accessed, collected, used, disclosed, retained, received, created or disposed of in order to fulfil

the requirements of the Contract, however obtained. Without limiting the generality of the foregoing, CMHC Information includes data held in any type of electronic format and information provided directly, indirectly or through third parties to the Contractor, subcontractor, reseller, agent or any other person engaged to perform the Work under the contract.

The Contractor acknowledges and understands that all CMHC Information is subject to Canadian laws on privacy and access to information under which CMHC is bound and that CMHC considers CMHC information to be under its custody and control of all times.

The Contractor further understands and agrees to treat all CMHC Information as proprietary, confidential and sensitive unless otherwise specifically agreed to in writing by CMHC. The Contractor shall restrict access to CMHC Information to those person who have a need to know this information in order to perform the Work under the Contract.

The Contractor shall ensure that CMHC Information shall remain in Canada and expressly agrees to segregate CMHC Information (whether in electronic format or in hard copy) from any other information in a database or repository physically independent from all other databases or repositories. Without limiting the generality of the foregoing, the Contractor shall not and shall ensure that any subcontractor, reseller, agent or any other person engaged to perform any part of the Work does not release, share or otherwise divulge CMHC Information to any other person including subsidiaries, branch offices, partners of the Contractor or subcontractors without the prior written consent of CMHC.

#### **4.16 Confidentiality**

#### **Mandatory**

**Proposals: Proposals will be held in strict confidence. Notwithstanding the foregoing, proponents are advised that as a Crown Corporation, CMHC is subject to the provisions of the Access to Information Act ("the Act"). Information submitted by proponents or third parties will only be exempted from disclosure if the records or part of them qualify for an exemption under the Act.**

**Contracts: The Contractor agrees that all records and information obtained by the Contractor on behalf of CMHC will be kept confidential to the extent required by federal Access to Information and Privacy Legislation or provincial law.**

1. The Contractor or its servants or agents will treat as confidential during, as well as after completion of, the contract, all information relating to the affairs of CMHC of which it acquires knowledge as a result of its engagement hereunder.

2. The Contractor shall, at the request of CMHC, provide an Oath of Secrecy for each of its employees or persons engaged in carrying out the work, in a form prescribed by CMHC.

3. Any documents provided to the Contractor in the performance of the work described herein shall be returned, uncopied to CMHC or destroyed by the Contractor within 6 months of the termination of this contract. For documents not returned to CMHC, the Contractor shall provide specific proof under oath of their destruction.

#### **4.17 House of Commons**

No member of the House of Commons shall be admitted to any share or part of this agreement or to any benefit arising there from.

#### **4.18 Binding**

This contract shall be binding upon the parties hereto, their heirs, executors, administrators, successors and assigns.

#### **4.19 Scope of Agreement**

This contract contains all of the agreements of the parties hereto and no other representations or warranties, verbal or otherwise, exist between the parties except those set out herein or attached as Specifications, Conditions and Addendum. In case of conflicts between the Contractor's documents and CMHC's documents, the latter shall govern.

#### **4.20 Conflict of Interest**

#### **Mandatory**

- (a) The Contractor and its principals, employees and agents shall avoid any conflict of interest during the term of this Agreement and shall immediately declare any existing, potential or apparent conflict and shall, upon direction of CMHC, take steps to eliminate any conflict or perception that a conflict of interest exists.
- (b) The Contractor must not provide any services to any third party in circumstances that might reasonably give rise to a conflict of interest, including a conflict between the Contractor's duties to that third party and the Contractor's duties to CMHC.
- (c) In the event that a conflict of interest, real or perceived, cannot be resolved to the satisfaction of CMHC, CMHC shall have the right to immediately terminate the Agreement. All portions of the Work which have been completed at the date of termination shall be forwarded to CMHC and CMHC shall be liable for payment to the Contractor of an amount which, in the sole opinion of CMHC, constitutes reasonable payment for the partial performance of the Contractor's obligations under the Agreement. Upon such payment, CMHC shall have no further obligation of any nature or kind to the Contractor.
- (d) Any former public office holder must be in compliance with the post-employment provisions of the Conflict of Interest and Post-Employment Code for Public Office Holders (2012) in order to derive a direct benefit from any contract which may arise from this request for proposal.

#### **4.21 Ownership**

(a) The quarterly reports and any other reports prepared exclusively for the Corporation shall remain the property of the Corporation and all copyrights thereto are the property of the Corporation and neither the Contractor nor its servants or agents shall divulge, release or publish any such documentation.

(b) Any and all other information relating to the Corporation and obtained by the Contractor during the course of execution of its duties under this Agreement shall remain the property of the Corporation and shall not be used in any way or disclosed to anyone without the prior written consent of the Corporation.

#### **4.22 Insurance**

a) The Contractor will provide and maintain Commercial General Liability insurance for a limit of \$2,000,000 per occurrence for bodily injury, or damage to property including loss of use of such property. This policy shall include the following extensions:

- cross liability including severability of interest clause
- blanket contractual liability
- Canada Mortgage and Housing Corporation to be added as additional insured
- broad form completed operations (required if contractor is doing physical work, e.g. painting, welding, flooring, etc.)
- non-owned automobile
- employer's liability (or confirmation that all employees are covered by WSIB)
- contractor's liability to include operations of independent contractors (if not provided then each subcontractor must provide a Certificate of Insurance confirming that they have liability insurance as detailed in the RFP)
- 30 days prior written notice of cancellation to Risk Management Consultant, 700 Montreal Road, Ottawa, Ontario K1A 0P7

b) The Contractor will provide and maintain Professional Liability insurance for a limit of not less than \$1,000,000. The policy will provide 30 days prior written notice of cancellation to Risk Management Consultant, 700 Montreal Road, Ottawa, Ontario K1A 0P7. Coverage is to include Contractors employees and Contractors contract employees (if applicable) as named insureds.

c) The Contractor will provide a Certificate of Insurance at least 5 days prior to the contract commencement date confirming the above insurance policies and evidencing that coverage has been placed with an Insurer licensed to do business in Canada. Upon receipt of the Certificate of Insurance CMHC reserves the right to request a Certified copy of the contractors policy for review.

It shall be the sole responsibility of the Contractor to decide whether or not any other insurance coverage, in addition to the insurance requirements stipulated herein, is necessary for its own protection or to fulfill its obligation under the contract. Any such additional insurance shall be provided and maintained by the Contractor at its own expense.

#### **4.23 Access to CMHC Property**

CMHC agrees to permit access by the Contractor's employees onto CMHC premises for the purpose of fulfilling its obligations as per the terms of this agreement. However, CMHC reserves the right to refuse entry of Contractor's personnel in cases of emergencies. CMHC also will have the right at any time to remove from and/or refuse entry to the work site any incompetent or intemperate employee who violates CMHC Safety and/or Security regulations or interferes with CMHC operations at the site.

The Contractor shall be fully responsible to CMHC for the acts and omissions (including negligence) of its subcontractors and of persons directly or indirectly engaged by such subcontractors as if such acts and omissions were those of the Contractor.

#### **4.24 Suspension of Work and Changes in Specifications**

CMHC may, at any time and from time to time, order a suspension of the work in whole or in part, and make modifications of, changes in or additions to the specifications of the type of services offered and methods of delivery. All directions given by CMHC in writing with respect to the foregoing shall be complied with by the Contractor. If any such suspension, modification, change or addition shall result in an increase or decrease in the cost of the work, the contract price shall be adjusted accordingly provided that the Contractor shall in no event be entitled to compensation for any loss of anticipated profits and provided further that minor increases or decreases in cost shall be disregarded.

#### **Article 5.0 - Contract Administration**

**5.1** The Contractor shall be notified in writing by CMHC's contract administrator, of the names of CMHC representatives authorized, from time to time, to assign jobs and approve payments with respect to the work carried out under this contract.

**5.2** Changes and/or additions to the terms and conditions of this contract shall be transmitted either by fax, e-mail or postal service to the party's authorized representative as follows:

**for CMHC;        Monika Morrison, Procurement Services  
Canada Mortgage and Housing Corporation  
700 Montreal Road  
Ottawa, Ontario K1A 0P7**

**Phone: (613) 740-5421   Fax: (613) 748-2998  
e-mail: \_\_\_\_\_**

**for Contractor; \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_**

---

**Phone:** (    ) \_\_\_\_\_ **Fax:** (    ) \_\_\_\_\_  
**E-mail:** \_\_\_\_\_

## **Article 6.0 - Contract Documents**

**6.1** The Contract documents consist of the following:

- (a) This form of Agreement as executed \_\_\_\_\_;
- (b) CMHC's Request for Proposal dated \_\_\_\_\_;
- (c) The Contractor's submitted Proposal dated \_\_\_\_\_; and

together with all written change notices issued by CMHC hereunder and such further specifications and documents as the parties may agree in writing.

**6.2** The contract documents are complementary and what is called for in any one shall be binding as if called for by all. The contract documents shall be interpreted as a whole and the intent of the whole rather than the interpretation of any particular part shall govern. In the event of a conflict between them, the contract documents shall have precedence among themselves in the order as listed above.

***IN WITNESS WHEREOF*** this agreement has been signed by the Parties hereto by their duly authorized signing officers.

**THE CONTRACTOR**

**CANADA MORTGAGE AND  
HOUSING CORPORATION**

_____	_____
_____	_____
_____	_____

## 7 SECTION 7 APPENDICES

### APPENDIX A

### MANDATORY

#### 7.1 Certificate of Submission

<hr/>	_____ hereby:
Company Name	Procurement Business Number (PBN)

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I. offers to provide services and/or products to CMHC, as described in this proposal, on and if, as and when required basis, all in accordance with the Request for Proposal;

II. offers the terms as set out in this proposal, including any pricing proposal for a period of sixty (60) days as specified in section 2 of the RFP;

III. certifies that, at the time of submitting this bid, is in full compliance with all tax statutes administered by all provincial, territorial and federal Ministries of Finance and that, in particular, all returns required to be filed under all provincial and federal tax statutes have been filed, and all taxes due and payable under those statutes have been paid or satisfactory arrangements for their payment have been made and maintained;

IV. represents and warrants that in submitting the proposal or performing the Contract, there is no actual or perceived conflict of interest;

V. represents and warrants that in preparing the proposal, there was no actual or perceived unfair advantage due to the receipt of information regarding the RFP that was not made available to other proponents;

VI. certifies that this proposal was independently arrived at, without collusion;

VII. certifies that no gratuities or gifts in kind were offered to any CMHC employee, Board member or Governor-in-Council appointee; and intended, by the gratuity, to obtain a contract or favourable treatment under a contract;

VIII. authorizes CMHC to conduct such investigation as it deems appropriate to verify the contents of the proposal;

IX. certifies, unless explicitly outlined in the proposal, that all pricing information is based on service provision which, at a minimum, fully meets all of the existing service standards as outlined in the Statement of Work;

X. agrees to comply with all of the section 6.0 contract MANDATORY clauses in an unaltered form as stated;

XI. (for sole proprietorships and partnerships) provide permission herewith to CMHC to undertake credit checks on the individuals listed below (names, signatures and home addresses of each must be provided).

XII. agrees that, in the event of acceptance of this proposal, it will enter Contract negotiations in accordance with the RFP, and upon entry into a Contract with CMHC, it will commit to providing the full scope of services identified in the Contract.

XIII. agrees that all responses and related materials become the property of CMHC, will not be returned and CMHC will not reimburse the proponent for any work related to, travel or materials supplied in the preparation of the RFP response.

XIV. agrees that it and any other persons for which it is responsible, who are to perform the work as stated in this RFP, at the request of CMHC will comply with security screening as deemed appropriate;

Signed this \_\_\_\_\_ day of \_\_\_\_\_, 2013 at \_\_\_\_\_, Canada.

*Corporations are not required to provide a corporate seal. The signature of one witness is required for the signature of each Owner/Signing Authority.*

**Corporation/Individual:**

\_\_\_\_\_  
Signature of Signing Authority

\_\_\_\_\_  
Name and Title of Signing Authority

Declaration: I have the authority to bind the company.



## APPENDIX B

### 7.2 Evaluation Table

EVALUATION CRITERIA	A	B	C	D
	WEIGHT 120 Total	POINTS 1 to 10	UPSET SCORE	SCORE AxB
<b>4.5 Proponents Qualifications</b>  <b>Information about office location(s): If awarded this Agreement, which office would provide support services? Which offices/warehouses would service each of the Regional Offices.</b>	5		N/A	
<b>4.6 Response to Statement of Work</b>  <u><b>Products &amp; Services</b></u> - delivery lead time offered - rush/urgent order turn-around-time - alternative “Green” product integration plan - back order process - product discrepancies / returns - branded product availability  <u><b>Electronic Ordering System</b></u> - unique /ease of use system proposed - bilingual features - controls to ensure correct pricing - client order management capability - turn around and process times - invoicing, reports & on-line capability  <u><b>“Green” Products</b></u> - catalogue products classified as “Green” products - products produced with recycled content  <u><b>High Level Implementation Plan</b></u> - implementation strategy proposed - product branding plan outline - bilingual customer service / interface	60  25  15  10  10		420	

<b>EVALUATION CRITERIA</b>	<b>A</b>	<b>B</b>	<b>C</b>	<b>D</b>
	<b>WEIGHT 120 Total</b>	<b>POINTS 1 to 10</b>	<b>UPSET SCORE</b>	<b>SCORE AxB</b>
<b>Subtotal</b>				
<b>4.10 Pricing Proposal</b>  - discount schedule(s)	<b>40</b>		<b>N/A</b>	
<b>TOTALS</b>	<b>105</b>			
<b>Lead Proponent Reference Check</b>		<b>Pass _____ Fail _____</b>		

## **APPENDIX C**

### **7.3 Mandatory Compliance Checklist**

<input type="checkbox"/>	Submission Deadline	Section 2.3
<input type="checkbox"/>	Offering Period	Section 2.7
<input type="checkbox"/>	Proponent Qualifications	Section 4.5
<input type="checkbox"/>	Response to Statement of Work	Section 4.6
<input type="checkbox"/>	Financial Information	Section 4.7
<input type="checkbox"/>	Pricing Proposal	Section 4.9
<input type="checkbox"/>	Proposed Contract	Section 6
<input type="checkbox"/>	7.1 Certificate of Submission	Appendix A
<input type="checkbox"/>	Product List	Attached to RFP