

RETURN BIDS TO:
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Bid Receiving - PWGSC / Réception des
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11 Laurier St./11, rue Laurier
Place du Portage, Phase III
Core 0A1 / Noyau 0A1
Gatineau
Québec
K1A 0S5
Bid Fax: (819) 997-9776

LETTER OF INTEREST
LETTRE D'INTÉRÊT

Comments - Commentaires

Vendor/Firm Name and Address
Raison sociale et adresse du
fournisseur/de l'entrepreneur

Issuing Office - Bureau de distribution
Special Projects/Projets Spéciaux
11 Laurier St./11, rue Laurier
Place du Portage/, Phase III
Floor 10C1/Étage 10C1
Gatineau
Québec
K1A 0S5

Title - Sujet RFI for Integrated Relocation Progr	
Solicitation No. - N° de l'invitation 24062-140087/A	Date 2013-08-21
Client Reference No. - N° de référence du client 24062-140087	GETS Ref. No. - N° de réf. de SEAG PW-\$\$ZL-106-26343
File No. - N° de dossier 106zl.24062-140087	CCC No./N° CCC - FMS No./N° VME
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2013-09-30	
Time Zone Fuseau horaire Eastern Daylight Saving Time EDT	
F.O.B. - F.A.B. Plant-Usine: <input type="checkbox"/> Destination: <input type="checkbox"/> Other-Autre: <input type="checkbox"/>	
Address Enquiries to: - Adresser toutes questions à: Fortin, Daniel J.	Buyer Id - Id de l'acheteur 106zl
Telephone No. - N° de téléphone (819) 956-1417 ()	FAX No. - N° de FAX (819) 956-2675
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction: TREASURY BOARD OF CANADA, SECRETARIAT RECEIVING RM P.155 300 LAURIER AVE - W OTTAWA Ontario K1A0R5 Canada	

Instructions: See Herein

Instructions: Voir aux présentes

Delivery Required - Livraison exigée See Herein	Delivery Offered - Livraison proposée
Vendor/Firm Name and Address Raison sociale et adresse du fournisseur/de l'entrepreneur	
Telephone No. - N° de téléphone Facsimile No. - N° de télécopieur	
Name and title of person authorized to sign on behalf of Vendor/Firm (type or print) Nom et titre de la personne autorisée à signer au nom du fournisseur/ de l'entrepreneur (taper ou écrire en caractères d'imprimerie)	
Signature	Date

Solicitation No. - N° de l'invitation

24062-140087/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur

106zl

Client Ref. No. - N° de réf. du client

24062-140087

File No. - N° du dossier

106zl24062-140087

CCC No./N° CCC - FMS No/ N° VME

Please see attached RFI revision

Annex A

Integrated Relocation Program High-Level Technical Service Requirements and Business Volumes

General

This Annex provides a high level description of the services required and the historical annual business volumes which are attached as Appendix 1.

Canada reserves the right to change at any time any or all of the technical requirements stated below.

1. IRP Overview

To support government operations, the IRP is the government program to assist employees and its members in relocating. On an annual basis the government relocates between 15,000 to 20,000 employees and its members through a program administered by a contracted relocation service provider. The overall distribution of relocations is approximately 80% for the CAF, 12% for the RCMP and the remaining 8% for the GoC. The program is administered through a contracted relocation service provider.

Government aims to relocate an employee in the most efficient manner at the most reasonable cost to the public while having minimum detrimental affect on departmental operations as well as on the employee and his/her family.

The current IRP is governed by the following similar but distinct policy documents.

- a) Canadian Forces Integrated Relocation Policy (CFIRP):
<http://www.cmp-cpm.forces.gc.ca/dgcb-dgras/pd/rel-rei/cfirp-prifc-2011-eng.asp>
- b) Royal Canadian Mounted Police Integrated Relocation Policy (RCMP RD):
http://www.irp-pri.com/docs/policies_directives/rcmp/RCMP_IRP_2009_10_FINAL_E.pdf
- c) National Joint Council Relocation Directive (NJCRD):
<http://www.njc-cnm.gc.ca/directive/index.php?did=6&lang=eng>
- d) Initial Appointees Relocation Program:
http://www.tbs-sct.gc.ca/pubs_pol/hrpubs/TBM_113/iairp-prinefp-eng.asp
- e) Executive Group (EX) and Governor In Council Appointees (GIC) - Relocation Provisions:
<http://www.tbs-sct.gc.ca/hr-rh/gtla-vgcl/eggca-gdpngc/eggca-gdpngc-eng.asp>

Questions to industry:

- 1.1 *Describe the industry best practices in managing a relocation program. Please rank the top 5 best practices in order of priority.*
- 1.2 *With consideration to Canada's practices and policies, what improvements if any would industry recommend to Canada? In responding to this question consider Canada's objective of providing quality services, increase efficiencies and effectiveness in the delivery of the program. Please rank your top 5 recommendations in order of priority.*
- 1.3 *How does industry support change management as it relates to either policy and/or legislation changes affecting program delivery?*

2. Relocation Process

The contracted relocation service commences following the authorization being received by the Contractor from the CAF, RCMP and individual government departments and agencies.

The current RCMP and GoC Directives require the contracted relocation service provider to interact frequently with RCMP and GoC authorities to obtain prior approval for many of the expenditures whereas the CAF Directive does not require such frequent communications. There are currently three phases in the relocation process:

- a) Planning Phase:
 - File authorization;
 - Registration;
 - Initial orientation; and
 - Steps to dispose of and acquire residences.
- b) Execution Phase:
 - Complete the documentation required to arrange shipping of household goods and effects;
 - Complete the documentation and arrange for travel to new location;
 - Interim accommodations;
 - Pay bills associated with the acquisition and disposal of a residence; and
 - House Hunting Trip (HHT).
- c) Reconciliation Phase:
 - Collection receipts and process claims;
 - File audit;
 - Recover over-payment as necessary; and
 - File closure.

Note: Once a file is authorized the employee/member registers with the contracted service provider who administers the above steps. On completion of the relocation the contracted service provider completes the steps outlined in the Reconciliation Phase and the appropriate department or agency authorizes the closure of the relocation file.

The Contractor must:

- a) Produce and maintain a General Relocation Information Package (GRIP);
- b) Provide information pertaining to real estate markets across Canada; and
- c) Provide general information on the overall program for each of the three entities.

Note: At times, due to operational requirements these three distinct phases occur in an extremely compressed time frame.

Questions to industry:

- 2.1 *What is the industry common practice as it relates to points of contact for a contractor to administer a relocation file where clients are geographically dispersed nationally and/or internationally?*
- 2.2 *How do the number of points of contact and/or their location influence the cost of administering a relocation file? If so, what are the key factors that might influence cost?*

2.2 *What is the recommended number of points of contact?*

3. Security and Personal Information Requirements

- a) The Contractor must hold a valid Designated Organization Screening (Protected B); and
- b) The Contractor's employee requiring access to PROTECTED information must hold a valid Reliability Status in accordance with Canadian Industrial Security Manual:
<http://ssi-iss.tpsgc-pwgsc.gc.ca/msi-ism/msi-ism-eng.html>
- c) The Contractor must be able to collect and safeguard personal information including the disposal of the CAF records in accordance with the Privacy Act
<http://laws-lois.justice.gc.ca/eng/acts/P-21/page-1.html> and any other applicable privacy legislation. The Contractor must ensure that Personal information is stored in Canada.

4. Records Management

The Contractor must provide a records management plan that outlines the safeguarding protocols.

Questions for industry:

4.1 *How does industry typically handle records management and destruction?*

5. Service Delivery Method

Authorized members and/or employees will require:

- a) Immediate access to the Directives/General Relocation Information Package (GRIP) and market information);
- b) Initial orientation and ongoing advice/counselling at various stages of the relocation;
- c) Access to advisors for 12 hours during normal local working hours and priority referral with limited capability 24 hours a day, 7 days a week;
- d) Be familiar with the individual relocation requirements to provide personalized service (i.e. no need to explain the relocation history each time a different advisor is involved);
- e) Advances and ability to submit claims and receive payment;
- f) Travel arrangements with the contracted travel service provider on behalf of the member; and
- g) Access to all required forms.

Questions for industry:

5.1 *How is service provided to private industry?*

5.2 *What is the norm for operating hours for relocation service delivery for other clients?*

5.3 *What is the industry standard for response times to relocation questions?*

5.4 *What communication methods are used in the industry to deliver a relocation service? What is the most predominant method of communication?*

6. Basis of Payment

Currently, Canada makes progress payments in accordance with an all-inclusive Administration Fee.

Question for Industry:

6.1 *What is/are the industry payment standard(s)?*

7. Official Languages

There is a requirement to provide counseling services and all documents, information, claims and other written materials in the official language of the member/employee's choice.

8. Third Party Service Providers

The requirement is for the development and maintenance of a registry of third party service providers offering specified services at the preferred rates for the following services:

- Real Estate Services;
- Lawyers Notary Services (purchase and sale);
- Home Appraisal Services (Standard Residence and CERC Standard);
- Home Inspection Services;
- Rental Search Services; and
- Quality assurance of TPSP.

Question for Industry:

8.1 *How does industry currently provide third party services? Describe the types of agreements and/or arrangements for third party services. Is there an industry standard?*

9. Performance Measurement

There is a requirement to produce a Performance Measurement Plan that provides quantifiable, measurable standards and allows for independent verification.

For information purposes, the current contract requires the Contractor to develop and deliver a Performance Measurement Plan to meet all the required service components.

The Performance Measurement Plan identifies all performance measures and includes:

- a) Quality of the services provided (meeting the service level commitments to the CAF, RCMP and GoC clients);
- b) Financial Management functions, including the speed of payments to members and employees;
- c) Timeliness of contact with members and employees;
- d) Members and employees caseload volume handled by individual Contractor resources;
- e) Staffing of vacant key Contractor Positions and On-Site member and employee advisors; and
- f) Bilingual capability of client-service representatives.

Question for Industry:

9.1 *What are the industry practices relating to measuring performance standards for its clients?*

9.2 *What are the consequences and/or incentives if any relating to performance measures?*

10. Information Management/Technology

Canada requires that the service provider's computer services servers must be located in Canada and must contain.

- A secure and non-secure website;
- Registration system;
- Tracking system (log/notepad/approvals);
- Reporting capability; and
- Financial accounting.

Questions for Industry:

10.1 What is the industry standard for inter-active systems (i.e. employee self-service)?

11. Adaptability

The service provider must be able to:

- Adapt to changes in the policy governing relocations in a timely fashion;
- Adapt IM/IT systems to policy changes; and
- Adapt service delivery to respond to policy changes.

12. Financial Management

There is a requirement to account for all relocations on a fiscal year basis including providing: all administration, coordination and financial management functions including flow-through costs for relocation services both domestically and internationally. Relocation services include standard relocations (intra/ inter provincial relocations) specialized locales, and isolated posts. As a minimum Financial Management should include the following functions:

- Accounts payable and Accounts receivable;
- Cost accounting;
- Issue of statement of accounts;
- Invoice processing;
- Verification, reconciliation processing of expense claims and advances; and
- Calculation, withholding and remitting of deductions.

Questions for Industry:

12.1 How is service provided to private industry?

12.2 How does the industry normally handle financial transactions?

12.3 Are financial advances used in industry and if so, what measures are taken to prevent over-payment?

13. Policy Interpretation Challenges

Member/employee challenges relating to policy interpretation entitlements are resolved internally within the federal government. However, there is a requirement for the contractor to provide information relating to the challenge.

Questions for Industry:

13.1 *What is the industry standard practice relating to policy interpretation challenges?*

13.2 *Does the service provider normally participate in such challenges and if so, describe the extent of the involvement?*

14. Life Cycle of the Contract

The requirement is for the provision of Relocation Services for as many as 5 years with an option to extend for two additional 1-year periods.

Questions for Industry:

14.1 *What standard for contract life is the norm for private industry?*

14.2 *What are the advantages/disadvantages from an industry perspective of longer/shorter contracts?*

15. Reporting Requirements

There is a requirement to provide regular reporting relating to business volumes, file opening and closing, expenditures (including taxes), customer satisfaction, TPSPs, and other adhoc reports as required.

Questions for Industry:

15.1 *What reporting packages are used in private industry?*

Additional Questions

1. What are the advantages, if any, of having one or multiple service providers to deliver this service? Does industry have any recommendations and if so, what is the rationale for the recommendation?
2. How long of a 'start-up' period is required for industry to commence the service from contract award?
3. What are the key success factors used by industry when assessing relocation services providers capabilities?
4. What evaluation criteria should Canada use to compare the quality and capability of suppliers?
5. What selection methodologies are used by your clients to determine their choice of a relocation supplier? (i.e. based on technical merit, quality and price)? Does the service delivery model influence the selection methodology and if so, how?
6. What measures can Canada take to ensure that all potential suppliers are treated fairly and equitably?
7. Respondents are encouraged to provide any additional information that they feel may either help to ensure the requirement is clearly defined or suggest other approaches.
8. Based on the information contained in this RFI is/are there any barrier(s) that could prevent you from participating in potential future processes relating to this requirement?

Appendix 1 to Annex A
Historical Annual Business Volumes¹

1. The CAF relocation volumes comprises of domestic within Canada, continental (Canada and the USA) and International relocations averaging approximately 15,000 per fiscal year.

Zone	Province	Office Location	2009/10	2010/11	2011/12	2012/13
East	Newfoundland & Labrador	9 Wing Gander	175	185	107	143
East	Nova Scotia	12 Wing Shearwater	220	186	223	238
East	Nova Scotia	14 Wing Greenwood	351	332	283	327
East	Nova Scotia	CFB Halifax Dockyard	939	845	883	796
East	New Brunswick	Camp Gagetown	1,652	1,886	1,241	1,363
Central	Quebec	Garrison St-Jean	383	364	284	297
Central	Quebec	Garrison Valcartier	1,046	1,174	1,069	994
Central	Quebec	3 Wing Bagotville	253	258	188	208
Central	Quebec	USS Montreal	239	208	239	245
Central	Ontario	22 Wing North Bay	170	193	174	162
Central	Ontario	NDHQ - Domestic	1,398	1,368	1,171	1,328
Central	Ontario	8 Wing Trenton	572	570	488	486
Central	Ontario	ASU Toronto	446	440	406	287
Central	Ontario	CF International	371	391	444	505
Central	Ontario	CFB Borden	2,512	2,164	1,451	1,805
Central	Ontario	CFB Kingston	927	1,144	1,351	1,041
Central	Ontario	CFB Meaford	358	156	66	172
Central	Ontario	CFB Petawawa	886	902	924	929
West	Manitoba	CFB Shilo	332	375	316	359
West	Manitoba	CFB Winnipeg	454	421	364	401
West	Saskatchewan	CFB Moose Jaw	155	164	134	186
West	Alberta	Garrison Edmonton	843	953	813	781
West	Alberta	CFB Wainwright	403	286	152	190
West	Alberta	CFB Cold Lake	352	306	299	347
West	British Columbia	CFB Esquimalt	1,003	1,161	1,217	1,044
West	British Columbia	19 Wing Comox	242	213	193	239
Other	Germany	CFSU (Europe)	146	128	139	152
Yearly Volume			16,828	16,773	14,619	15,025

Volume decrease using 2009 as baseline: 0.33% 13.13% 10.71%

¹ Historical data is presented for information purposes only and should not be interpreted as work expectation.

CAF: Historical volume by month:

Month	2009/10	2010/11	2011/12	2012/13	2013/14	Avg/ Month
April	Data Not Available	2,442	2,297	3,474	3,061	2,819
May	Data Not Available	1,590	1,555	1,863	1,408	1,604
June	Data Not Available	1,328	1,178	888	1,081	1,119
July	Data Not Available	1008	757	635	Data Not Available Yet	800
August	Data Not Available	748	775	568	Data Not Available Yet	697
September	Data Not Available	631	611	457	Data Not Available Yet	566
October	Data Not Available	749	527	700	Data Not Available Yet	659
November	Data Not Available	679	534	499	Data Not Available Yet	571
December	495	376	521	368	Data Not Available Yet	440
January	715	520	621	509	Data Not Available Yet	591
February	907	1,003	685	742	Data Not Available Yet	834
March	4,986	5,706	4,692	4,433	Data Not Available Yet	4,954
Total / Year	7,103	16,780	14,753	15,136	5,550	15,654

Note: The volume variance is due to the varying stages of a file's lifecycle, ie., pending startup, cancellation and/or closure

2. GoC: Volumes (reconciled files) are by fiscal year and domestic within Canada only. The volume is divided into two groups: "Non-Initial Appointee" and "Initial Appointee". The Non-Initial appointee relocations have been relatively consistent during the period 2009-2013, but the Initial Appointee relocations have experienced a steady downward trend during a period of government restructuring.

Type	2009/10	2010/11	2011/12	2012/13	2013 (Apr - Aug)
Non-Initial Appointee	1,567	1,546	1,451	1,528	734
Initial Appointee	1,805	1,438	1,130	648	285
Total	3,372	2,984	2,581	2,176	1,019

3. RCMP: relocation volumes are by fiscal year - domestic within Canada only:

Origin Province	2009	2010	2011	2012	2013 (Jan-June)
AB	345	358	388	397	211
BC	622	563	624	603	270
MB	209	204	235	197	106
NB	126	82	97	84	35
NL	99	94	119	102	81
NS	125	104	114	135	90
NT	55	65	71	79	54
NU	53	68	52	55	44
ON	183	167	215	234	84
PE	22	20	18	27	21
QC	53	51	63	43	16
SK	305	279	305	291	166
YT	48	28	41	29	15
Total	2,245	2,083	2,342	2,276	1,193

ANNEX 'B'
List of All Industry Questions

Questions from Annex 'A'
1.1 Describe the industry best practices in managing a relocation program. Please rank the top 5 best practices in order of priority.
Industry Response
1.2 With consideration to Canada's practices and policies, what improvements if any would industry recommend to Canada? In responding to this question consider Canada's objective of providing quality services, increase efficiencies and effectiveness in the delivery of the program. Please rank your top 5 recommendations in order of priority.
Industry Response
1.3 How does industry support change management as it relates to either policy and/or legislation changes affecting program delivery?
Industry Response
2.1 What is the industry common practice as it relates to points of contact for a contractor to administer a relocation file where clients are geographically dispersed nationally and/or internationally?
Industry Response
2.2 How do the number of points of contact and/or their location influence the cost of administering a relocation file? If so, what are the key factors that might influence cost?
Industry Response
2.3 What is the recommended number of points of contact?
Industry Response
4.1 How does industry typically handle records management and destruction?
Industry Response
5.1 How is service provided to private industry?
Industry Response
5.2 What is the norm for operating hours for relocation service delivery for other clients?
Industry Response
5.3 What is the industry standard for response times to relocation questions?
Industry Response

ANNEX 'B' – Continued

Questions from Annex 'A' - Continued	
5.4	What communication methods are used in the industry to deliver a relocation service? What is the most predominant method of communication?
	Industry Response
6.1	What is/are the industry payment standard(s)?
	Industry Response
8.1	How does industry currently provide third party services? Describe the types of agreements and/or arrangements for third party services. Is there an industry standard?
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9.1	What are the industry practices relating to measuring performance standards for its clients?
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	Industry Response

Additional Questions

1. What are the advantages if any, of having one or multiple service providers to deliver this service? Does industry have any recommendations and if so, what is the rationale for the recommendation?

Industry Response

2. How long of a 'start-up' period is required for industry to commence the service from contract award?

Industry Response

3. What are the key success factors used by industry when assessing relocation services providers capabilities?

Industry Response

4. What evaluation criteria should Canada use to compare the quality and capability of suppliers?

Industry Response

5. What selection methodologies are used by your clients to determine their choice of a relocation supplier? (i.e. based on technical merit, quality and price)?

Does the service delivery model influence the selection methodology and if so, how?

Industry Response

6. What measures can Canada take to ensure that all potential suppliers are treated fairly and equitably?

Industry Response

7. Respondents are encouraged to provide any additional information that they feel may either help to ensure the requirement is clearly defined or suggest other approaches.

Industry Response

8. Based on the information contained in this RFI is/are there any barrier(s) that could prevent you from participating in potential future processes relating to this requirement?

Industry Response

