



REQUEST FOR STANDING OFFER

FOR

**Research and Writing Services for the Canadian Housing Observer
2014-2016**

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1 SECTION 1 GENERAL INFORMATION

1.1 Overview of Section 1

This section provides general information about Canada Mortgage and Housing Corporation (CMHC) and in particular about this Request for Standing Offer (RFSO).

1.2 Introduction and Scope

Canada Mortgage and Housing Corporation (CMHC) wishes to enter into Standing Offers (SOs) with a selection of vendors (hereinafter referred to as “Offerors”) for the purpose of research, writing, and editing services, as needed, related to the Canadian Housing Observer. (Previous editions of the Canadian Housing Observer (CHO) can be found at www.cmhc.ca/observer.) The duration of these Standing Offers will be for a three (3) year term. The total dollar value of resulting Call-ups from this Standing Offer (SO) will not exceed \$100,000.00 including all applicable taxes. Successful Offerors will be held to the per diem pricing submitted in their offer for the three year duration.

More detailed specifications can be found in Section 3, “Statement of Services to be covered under the Standing Offer (SO)”.

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.

Offerors may visit CMHC’s website at: <http://www.cmhc-schl.gc.ca/>

1.4 Purpose of Request for Standing Offers (RFSO)

CMHC will use this Request for Standing Offer (RFSO) to retain a source list of up to 4 (four) qualified Offerors to provide the services outlined herein on an “if-and-when-needed” basis. In a RFSO process, offers and Offerors are qualified in terms of ability to satisfy the stated mandatory criteria, while also providing pricing for the services that will be provided to CMHC.

The existence of these Standing Offers does not provide the selected Offerors with any exclusive rights to the provision of services outlined herein. CMHC reserves the right to contract with other suppliers if required.

1.5 Schedule of Events

The following schedule summarizes significant target events for the RFSO process. The dates may be changed by CMHC at its sole discretion and shall not become conditions of any Standing Offer (SOs) which may be entered into by CMHC and the selected Offerors.

Date	Activities
September 27, 2013	Request for Standing Offer (SO) issued
October 7, 2013	Submission of questions deadline
October 21, 2013	Offer Submission deadline
October, 2013	Evaluation and selection of SO Holders
October, 2013	Announcement of successful SO Holders
November, 2013	Debriefing of unsuccessful SO Offerors as requested

1.6 Terms and Conditions of Standing Offer and Any Resulting Call-Up

The general terms, conditions and clauses identified herein by title, number and date, are hereby incorporated by reference into and form part of this RFSO and any resulting Call-up, as though expressly set out herein, subject to any other express terms and conditions herein contained.

1.7 RFSO Potential 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 **Public Works and Government Services Canada** as the Official CMHC Source list. All Offerors **must** be registered with **Public Works and Government Services Canada** prior to submitting an offer. The Procurement Business Number (PBN) provided by this registration must be included with your offer. If an Offeror is not registered, and wishes to do so, access <https://buyandsell.gc.ca/> or call the Information Line at 1-800-811-1148.

1.8 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 Standing Offer Holders of services by using a T1204 supplementary slip. CMHC must therefore obtain the necessary information from Standing Offer Holders (including the Contractor's social insurance number and/or corporate identification number) in order to allow it to complete the T1204 supplementary slip. The Standing Offer Holders will be required to complete and sign a Supplier - Direct Deposit and Tax Information Form (CMHC/SCHL 3085) prior to execution of any Call-up resulting from this RFSO.

1.9 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.

The evaluation methodology in Section 5 fully describes any environmental preferences associated with this procurement.

1.10 Call-ups Against a Standing Offer

Call-ups against this Standing Offer will be on an if-and-when-needed basis. CMHC does not guarantee that any successful Offeror under this Standing Offer will in fact be awarded a Call-up. Upon being contacted for a Call-up, any Offeror may accept or decline the assignment.

Offeror selection for Call-ups against this Standing Offer will be based on expertise best suited for the task based on qualifications and experience.

Notwithstanding the above, CMHC reserves the right to Call-up Offerors randomly, at its discretion. CMHC's goal is to provide work to all Offerors on the Standing Offer if and when possible, while allowing some flexibility to CMHC staff in the selection process.

The Offeror will sign and remit the signed Call-up against Standing Offer Form to CMHC prior to the commencement of the work. The Call-up against the Standing Offer, signed by both parties, constitutes written approval for the Offeror to begin the work.

1.11 Quantity

The quantity of any goods and level of services specified in the RFSO are only an approximation of requirements given in good faith. In submitting an offer to this RFSO, the Offeror acknowledges that any quantities provided are estimates only, and testifies to its ability to accommodate increases or decreases in workload as they occur.

The making of a standing offer proposal by the Offeror shall not constitute a Standing Offer Agreement with CMHC to order any or all of the said goods or services. CMHC may or may not make one or more Call-ups against the standing offer.

The acceptance of a Standing Offer from an Offeror by CMHC does not necessarily mean that any Call-ups will be made against said standing offer.

2 SECTION 2 INSTRUCTIONS, TERMS AND CONDITIONS FOR SUBMITTING AN OFFER IN RESPONSE TO THIS REQUEST FOR STANDING OFFER (RFSO)

2.1 Overview of Section 2

The purpose of Section 2 is to inform the Offeror about CMHC's offer submission requirements pertaining to this RFSO process.

Offerors are advised the CMHC has provided as Appendix C a Mandatory Compliance Checklist to complete prior to submission. This is to ensure compliance 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 RFSO. All Offeror's offers **must** include a Certificate of Submission (or an accurate reproduction) signed by the Offeror.

Offerors **must** submit a signed Certificate of Submission as part of their offer. Should an Offeror not include the signed Certificate of Submission the Offeror 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 offers to the exact specified proposal delivery address is the sole responsibility of the Offeror. All risks and consequences of incorrect delivery of offers are the responsibility of the Offeror. CMHC will not assume or have transferred to it those responsibilities. All registered times will be in accordance with the time CMHC computer servers **receive** the offer, not the time the offer was sent by the Offerors.*

NOTE: Please be advised that E-BID has a size limitation of 10 MB. It is advisable and recommended that Offerors submit their offer in multiple smaller files.

It is recommended that the Offeror send an e-mail as soon as possible after the E-BID offer has been sent, notifying the contact person named in Section 2.4 Inquiries, that an offer has been submitted to E-BID, including the company name and e-mail address, with the date and time the offer was sent.

Upon receipt of offers, an automated confirmation will be issued to the sender's e-mail address. It is strongly recommended that Offerors follow up with the inquiries person named in Section 2.4 should they not receive said confirmation within 30 minutes of submission.

*** Please be advised that electronic transmissions may not necessarily be immediate and can experience lengthy delivery delays. Offerors should ensure that sufficient delivery time is allowed for offers to be received.**

Address for Delivery

Offers, including all supporting documentation, are to be sent electronically to the following e-mail address:

EBID@cmhc-schl.gc.ca

The subject line of the transmission must state: RFSO, file # [201303253](#)

Format

Offers may be submitted in MS Word or Adobe Acrobat PDF in English or in French.

NOTE: In certain email programs the “Send” format may need to be specified as either “HTML” or “Plain Text”. Rich Text formatted or Compressed (Zipped) documents cannot be opened by CMHC.

Offer Opening and Verification Period

All EBID offers received on or before the closing date and time specified in this RFSO, will be opened for evaluation purposes and verified by CMHC. If at that time, CMHC is unable to open an offer, the Offeror will be so advised and provided an opportunity to resubmit an openable version within 2 hours from notification.

Offer Submission Deadline

Mandatory

Your offer **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, on October 21, 2013

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

2.4 Inquiries

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

Heather Forsyth, Procurement Advisor
(613)748-2998
hforsyth@cmhc.ca

Information given verbally by any person within CMHC shall not be binding upon CMHC. Offerors must have written confirmation from CMHC for any changes, alterations, etc., concerning this RFSO. CMHC cannot guarantee a reply to inquiries received less than seven calendar days prior to the closing date.

All written questions submitted which in the opinion of CMHC affect all Offerors, will be answered by CMHC in writing and distributed to all Offerors by facsimile, 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 RFSO as a result of any inquiry or for any other reason, an addendum to this RFSO will be provided to each Offeror to whom CMHC has issued this RFSO by facsimile, e-mail or GETS.

2.5 Communication

During offer evaluations, CMHC reserves the right to contact or meet with any individual Offeror in order to obtain clarification of its submission or to gain insight into the quality and scope of relevant services. An Offeror 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 Offerors for this purpose.

2.6 Offeror Contact

The Offeror shall name a person in their offer 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

All responses **must** provide that the terms of the response including the pricing offer, shall remain valid and binding on the Offeror for a period of **90 (ninety) days** following the closing date.

2.8 Changes to Offer

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

2.9 Liability for Errors

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

2.10 Verification of Offeror's Offer

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

2.11 Ownership of Offers

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

All information regarding the terms and conditions, financial and/or technical aspects of the Offeror's offer, 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**. Offerors' documents and information so marked will be treated accordingly by CMHC. Notwithstanding the foregoing, Offerors 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.

2.12 Proprietary Information

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

2.13 Corporation Identification

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

2.14 Declaration re: Gratuities

In submitting its offer, the Offeror certifies that no representative for the Offeror 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 Call-up or favourable treatment under a Standing Offer.

2.15 Conflict of Interest

- (a) The Standing Offer Holder and its principals, employees and agents shall avoid any conflict of interest during the term of this Standing Offer 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 Standing Offer Holder 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 Standing Offer Holder's duties to that third party and the Standing Offer Holder'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 Standing Offer and any outstanding Call-ups resulting from the Standing Offer. All portions of the Services which have been completed at the date of termination of any Call-up resulting from the Standing Offer shall be forwarded to CMHC and CMHC shall be liable for payment to the Standing Offer Holder of an amount which, in the sole opinion of CMHC, constitutes reasonable payment for the partial performance of the Standing Offer Holder's obligations under the Call-up. Upon such payment, CMHC shall have no further obligation of any nature or kind to the Standing Offer Holder.
- (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 Call-up which may arise from this Standing Offer.

2.16 Declaration re: Bid Rigging and Collusion

In submitting its offer, the Offeror certifies that:

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

2.17 Security Clearance

CMHC may require employees of the selected Offeror to be security cleared in order to permit them access to CMHC documents. This process normally takes approximately two weeks. The Offeror or its employees may be denied certain Call-ups if they are not security cleared.

2.18 Ownership

The contracted research and/or writing, permissions, and graphics 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 Standing Offer Holder nor its servants or agents shall divulge, release or publish any such documentation.

2.19 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 fulfill the requirements of the Standing Offer, 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 Standing Offer Holder, any subcontractor, reseller, agent or any other person engaged to perform the Work under the Standing Offer.

The Standing Offer Holder 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 Standing Offer Holder further understands and agrees to treat all CMHC Information as proprietary, confidential and sensitive unless otherwise specifically agreed to in writing by CMHC. The Standing Offer Holder shall restrict access to CMHC Information to those persons who have a need to know this information in order to perform the Services under any Call-up awarded as a result of the Standing Offer.

The Standing Offer Holder 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 Standing Offer Holder shall not and shall ensure that any subcontractor, reseller, agent or any other person engaged to perform any part of the services does not release, share or otherwise divulge CMHC information to any other person including subsidiaries, branch offices, partners of the Standing Offer Holder or subcontractors without the prior written consent of CMHC.

2.20 Offeror’s Procurement Business Number (PBN)

As a potential supplier to CMHC, Offerors are required to obtain a Procurement Business Number (PBN). The PBN is created using the Offeror’s Canada Revenue Agency Business Number to uniquely identify the company and its branches, division, or offices, where appropriate.

All Canadian companies MUST have a PBN prior to the award of any Standing Offer as a result of this RFSO. Non-Canadian companies are strongly encouraged to obtain a PBN.

Companies may register for a PBN in the Supplier Information (SI) database, maintained by **Public Works and Government Services Canada** as the Official CMHC Source list. All Offerors **must** be registered with **Public Works and Government Services Canada** prior to submitting an offer. The Procurement Business Number (PBN) provided by this registration must be included with the offer. If an Offeror is not registered, and wishes to do so, access (<https://buyandsell.gc.ca/>) or call the Information Line at 1-800-811-1148.

2.21 Costs Associated with the Preparation of Offers

No payment shall be made for costs incurred in the preparation or submission of an offer in response to this RFSO for any reason whatsoever, including cancellation of this pre-qualification instrument at any time by CMHC.

No payment shall be made for costs incurred before receipt of a signed Call-up form under any resultant Standing Offer.

3 SECTION 3 STATEMENT OF SERVICES TO BE COVERED UNDER THE STANDING OFFER (SO)

3.1 Overview of Section 3

This section of the RFSO is intended to provide Offerors with the information necessary to develop a qualifying offer. The Statement of Services is a complete description of the services that may be required under this Standing Offer.

3.2 Statement of Services

The Canadian Housing Observer is CMHC's annual flagship publication providing an objective view of the state of housing in Canada. Written in plain language, this publication is geared towards, for example, federal, provincial, territorial and municipal policy makers; realtors; mortgage lenders and brokers; developers; home builders and renovators; planners; housing-related non-governmental organizations; and academics.

The Standing Offer Holder may be Called-up to do the following:

- (a) Propose, outline, research and/or write an assigned section(s) or chapter(s) in plain language and construct, assemble or obtain related footnotes, tables, graphs, photos, permissions and text boxes in a given (often tight) timetable using material provided by CMHC or material to be researched/collected by the research writer;
- (b) Submit drafts in Microsoft Word for text and PowerPoint/EXCEL for figures electronically to CMHC by a firm deadline;
- (c) Revise material in tight time frames to reflect comments from CMHC (There may be successive drafts to reflect comments as the publication progresses through CMHC's approval process.);
- (d) Review selected publication chapters and provide proofreading with edits to ensure accuracy;
- (e) Complete a scan of current Canadian housing issues to propose new chapter topics.
- (f) Provide analysis on data trends;
- (g) Provide descriptive text to meet accessibility criteria.

Topics could range broadly, e.g. housing finance, impacts of demographic and socio-economic trends on housing, housing markets, housing affordability, building sciences, sustainable housing, housing for persons with distinct housing needs, housing for senior or Aboriginal households, women and housing, housing conditions and indicators and core housing need, housing research, and other housing-related issues.

4 SECTION 4 OFFER REQUIREMENTS

4.1 Overview of Section 4

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

Response #	
4.2	Covering Letter
4.3	Table of Contents
4.4	Offeror's Qualifications
4.5	Response to Statement of Services
4.6	Financial Information
4.7	Pricing

Elaborate or unnecessarily voluminous offers are not desired. Offerors are encouraged to take care in completely answering questions and offer requirements and to avoid submitting extraneous materials that do not show how the Offeror is able to meet Standing Offer requirements.

Requirements for each Response Item are detailed below.

4.2 Covering Letter

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

- (a) A description of the company.
- (b) The names of the principals.
- (c) The primary contact person with respect to this RFSO: the individual's name, address, contact numbers by phone and fax, and contact e-mail address, if available.
- (d) The names of the person(s) who would be undertaking contracted work.
- (e) The locations of primary and all other offices that would be servicing any Call-ups issued from this Standing Offer.

4.3 Table of Contents

The Offeror shall include a Table of Contents using the response item headings and numbering system identified in 4.1 of this section of the RFSO. The response should be paginated for easy referencing by the evaluation committee.

4.4 Offeror's Qualifications

Mandatory

The Offeror's designated person who would be undertaking the work must hold a university degree(s) in an appropriate discipline(s) such as Architecture, Building Science, Economics, and Engineering related to Building Science, Demographics, Environmental Studies, Finance and Urban Planning and have considerable and broad experience in researching, writing and editing in plain language, in the Canadian housing field. The Offeror should have a broad understanding of housing issues and jargon.

The Offeror's offer **must** include information about the Offeror's qualifications as follows:

- (a) A description of the firm and service delivery specialization.
- (b) Résumés for all project personnel who would be assigned to the CMHC Call-ups reflecting the above qualifications requirements.
- (c) Number of years experience the assigned personnel has as a researcher/writer.
- (d) References: A list of three (3) contracts of a similar size and scope which the Offeror currently holds or has held over the past 24 months. For each contract, the following information is required: company name and address; contact person name and phone number. CMHC may approach any such contact person for information relating to the quality of services provided by the Offeror.
- (e) Two legible samples (2 pages maximum per each sample) of housing-related articles written by personnel who would be assigned to the CMHC Standing Offer account. These samples should demonstrate, among other things, attention to detail with correct spelling and grammar.

4.5 Response to Statement Services Mandatory

In this section, the Offeror **must** provide detailed information relative to the specifications listed in Section 3, The Statement of Services to be covered under this Standing Offer.

4.6 Financial Information Mandatory

4.6.1 Credit Check

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

4.7 Pricing Mandatory

The Offeror **must** include per diem rates and any other pre-determined rates associated with the delivery of the services described in this RFSO. Successful Offerors will be held to their submitted per diem pricing for the three year duration.

CMHC contemplates a budget of up to \$33,000/year where payment would be made at the agreed-upon per diem based on the number of days actually spent to complete the work assigned. The Standing Offer will be for three years.

All prices and amounts of money in the offer 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 Offeror and will be paid by CMHC.

5 SECTION 5 EVALUATION AND SELECTION

5.1 Overview of Section 5

Section 5 describes the process CMHC will use to evaluate offers and qualify Standing Offer Holders. All Offerors that meet all of the mandatory criteria and meet or surpass any stated upset scores, will be considered for the Standing Offer. CMHC will award a Standing Offer to up to 4 (four) of the top scoring Offerors. Receipt of a Standing Offer does NOT automatically mean that an Offeror will receive subsequent Call-ups.

CMHC reserves the right to accept or reject any or all offers in whole or in part.

CMHC shall conduct the RFSO process in a visibly fair manner and will treat all Offerors equitably. To this end, it has established objective RFSO standards and evaluation criteria which will be applied uniformly to all Offerors. Therefore, no Offeror shall have any cause of action against CMHC arising out of a failure to award a Standing Offer, the failure to evaluate any offer, or the methods by which an offer is qualified.

5.2 Limitation of Damages

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

5.3 Evaluation Table

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

5.4 Evaluation Methodology

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

Each substantially compliant offer shall be evaluated by an Evaluation Committee made up of qualified personnel. Each Committee member shall evaluate and numerically score each offer in accordance with the evaluation criteria as shown in the Evaluation Table, Appendix "B".

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

Up to four of the Offerors with the highest score will be considered in the granting of the standing offer. Offerors offers must be compliant in that it meets the minimum upset scores.

5.5 Offeror Selection

Acceptance of an offer does not oblige CMHC to incorporate any or all of the accepted offers into a Standing Offer, but rather demonstrates a willingness on the part of CMHC to enter into negotiations for the purpose of arriving at Satisfactory Standing Offers with one or more parties. CMHC reserves the right to alter the stated requirements as needs require and to accept an alternate offer included in any Offeror's offer.

Without changing the intent of this RFSO or the qualifying Offerors' offer, CMHC will enter into discussions with the qualifying Offerors for the purpose of finalizing Standing Offers. If at any time CMHC decides that any qualified Offeror cannot satisfy CMHC's requirements, CMHC may terminate negotiations.

Announcement of the successful Offerors will be made to all Offerors following the notification of the Standing Offer Offerors.

5.6 Financial Review

CMHC will carry out a credit check and/or a financial capacity on the lead Offerors before beginning Standing Offer discussions. This is a pass/fail test. Pass means that Standing Offer discussions begin. Fail means that the lead Offerors may not enter into Standing Offer discussions and are disqualified from further consideration. The financial review will be based on the information supplied by the Offeror as per Section 4.6.1 this RFSO.

6 SECTION 6: TERMS AND CONDITIONS OF STANDING OFFER AND ANY RESULTING CALL-UPS FROM THIS STANDING OFFER

6.1 Standing Offer

The attached Standing Offer and resulting Call-ups Terms and Conditions forms section 6.3 of this RFSO and will be a part of any Call-ups raised against this Standing Offer.

6.2 Mandatory Terms and Conditions

The terms and conditions, or sections of the Standing Offer Terms and Conditions that are labelled mandatory must be accepted by the Standing Offer Holder without alteration.

6.3 Standing Offer and Any Resulting Call-up Terms and Conditions

Article 1.0 - The Services

1.1 The Standing Offer Holder covenants and agrees to provide research and/or writing services on an if-and-when-needed basis for research and writing services for the Canadian Housing Observer. CMHC will issue a written call up to the Standing Offer Holder when CMHC requires the Standing Offer Holder's Services. Each Call-up issued shall be subject to the terms and conditions of the Standing Offer. Upon the issue of a Call-up, the Standing Offer Holder shall provide the services as detailed in the Call-up and in accordance with the Statement of Goods and/or Services.

1.2 The Standing Offer Holder acknowledges that the Standing Offer does not guarantee that CMHC will issue a Call-up to the Standing Offer Holder and that Call-ups will be issued at the sole discretion of CMHC.

Article 2.0 - Term of the Standing Offer

2.1 The term of the Standing Offer Agreement shall be for a period of three (3) years commencing on January 2, 2014 and ending on December 31, 2016. CMHC will have the right to refresh the Standing Offer by seeking new suppliers to submit offers on the first anniversary of the initiation of the Standing Offer.

2.2 Notwithstanding Article 2.1 above, CMHC shall conduct an assessment of the Standing Offer Holder's work performed for past assignments and based on this assessment, at no less than sixty (60) days prior to the anniversary date of signing this Standing Offer, CMHC will advise the Standing Offer Holder in writing of their willingness to extend yearly or decision to terminate this Standing Offer.

2.3 Termination

CMHC may terminate a Call-up against a Standing Offer for any reason with no penalty by giving thirty (30) days written notice, at any time during the Term.

In a case of default by the Standing Offer Holder, CMHC may, by giving ten (10) days prior written notice to the Standing Offer Holder, terminate Call-up(s) without charge. The following will constitute events of default:

1. The Standing Offer Holder commits a material breach of its duties under the Call-up against a Standing Offer, unless, in the case of such breach, the Standing Offer Holder, within ten (10) 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 or takes reasonable steps to cure such breach and (b) indemnifies CMHC for any resulting damage or loss;
2. The Standing Offer Holder commits numerous breaches of its duties under this Standing offer that collectively constitute a material breach;
3. A change in control of the Standing Offer Holder 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 Standing Offer Holder are acquired, by any entity, or the Standing Offer Holder is merged with or into another entity to form a new entity, unless the Standing Offer Holder demonstrates to the satisfaction of CMHC that such event will not adversely affect its ability to perform the services under this Standing offer;
4. The Standing Offer Holder commits fraud or gross misconduct; or
5. The Standing Offer Holder becomes bankrupt or insolvent, or a receiving order is made against the Standing Offer Holder, 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 Standing Offer Holder, or if the Standing Offer Holder takes the benefit of any Statute for the time in force relating to bankrupt or insolvent debtors.

In the event of a termination notice is issued, the Standing Offer Holder shall promptly review all work in progress under the Call-up and deliver the work in progress to CMHC with a final invoice. Subject to the deduction of any claim which CMHC may have against the Standing Offer Holder arising out of the Call-up against a Standing Offer or out of termination, payment will be made within thirty (30) days of the date of receipt of the invoice for the value of all finished work delivered and accepted by CMHC, such value to be determined by CMHC in its sole discretion in accordance with the rates specified in the Call-up against a Standing offer. Upon such payment, CMHC shall have no further obligation of any nature or kind to the Standing Offer Holder.

The Standing Offer Holder shall provide to CMHC any reasonable termination assistance requested by CMHC to allow the Work to continue without interruption or adverse effect and to facilitate the orderly transfer of the Work to CMHC or its designee.

Article 3.0 - Financial

3.1 Fixed Pricing

In consideration of the provision of the Goods and/or Services, as described in Article 1.0, CMHC agrees to pay the Standing Offer Holder an amount based on rates provided in response to Article 4.7 of this RFSO.

3.2 Taxes to be Collected by Standing Offer Holder

Standing Offer Holder GST/HST or RST, to the extent applicable and required to be collected by the Standing Offer Holder and specifically agreed between the Standing Offer Holder and CMHC, shall be collected by the Standing Offer Holder on the consideration due and shown as a separate item on an invoice. Where the Standing Offer Holder is required to collect the GST/HST, the invoice issued by the Standing Offer Holder shall show the Standing Offer Holder's GST/HST number. Where the Standing Offer Holder is also required to collect the Quebec Sales Tax (QST), the invoice shall show the QST number. The Standing Offer Holder shall duly remit to the Canada Revenue Agency any amounts of GST/HST collected on the consideration payable pursuant to this Standing Offer and any resulting Call-ups. The Standing Offer Holder shall remit to the appropriate provincial taxing authorities any amounts of RST or QST collected by the Standing Offer Holder from CMHC pursuant to this Standing Offer and any resulting Call-up.

If the Standing Offer Holder is a non-resident of Canada, any payments made to the Standing Offer Holder by CMHC pursuant to Article 3.1 in respect of services rendered in Canada will be subject to a 15% withholding tax as required pursuant to Regulation 105 of the Income Tax Act. If any such withholding taxes are required to be withheld from any amounts payable to the Standing Offer Holder, CMHC shall make such withholdings and duly and promptly remit the amount withheld to the Canada Revenue Agency.

3.3 Invoicing

The Standing Offer Holder shall submit detailed invoices for work completed under a Call-up to CMHC during the Term. The Standing Offer Holder must allow thirty (30) days from delivery of invoice for payment without interest charges. The Standing Offer Holder cannot invoice prior to performance of the service under a Call-up. All invoices, notices and requests for payment must make reference to this Standing Offer by quoting **CMHC file #201303253** and be forwarded to the CMHC representative designated in the Standing Offer.

3.4 Audit

The Standing Offer Holder 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 Standing Offer Holder agrees to allow the Corporation's internal and external auditors the right to examine, at any reasonable time, any and all records relating to the services identified herein.

Any audit will be subject to generally accepted accounting principles.

The Standing Offer Holder 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 Standing Offer Holder in the course of conducting any audit in order to avoid disruption in day-to-day operations.

Article 4.0 - General Terms and Conditions

4.1 Assignment of the Standing Offer

The Standing Offer shall not be assigned in whole or in part by the Standing Offer Holder without the prior written consent of CMHC. It is understood and agreed that the Standing Offer Holder may engage other entities to assist the Standing Offer Holder in providing certain of the services contemplated in a Call-up against a Standing Offer provided that the Standing Offer Holder shall at all times remain responsible for the provision and quality of such services in a manner which fully recognizes and respects the confidential nature of the services. The Standing Offer Holder undertakes to advise such entities in writing that they are independent Standing Offer Holders, and are not employees or agents of the Corporation. No assignment of this Standing Offer shall relieve the Standing Offer Holder from any obligation under this Standing Offer or Call-up raised against this or impose any liability upon CMHC.

4.2 Standing Offer Holder's Indemnification

The Standing Offer Holder agrees that none of CMHC, its employees, officers, agents or subcontractors shall be liable for any third party damage, loss or claims in any way related to the provision of the Services by the Standing Offer Holder. The Standing Offer Holder agrees to indemnify and hold harmless CMHC, its officers, employees, agents or subcontractors from and against any loss, damages, costs, expenses, claims, demands, actions, suits or other proceedings of every nature and kind arising from or in consequence of an act or omission committed by the Standing Offer Holder during the provision of the Services under a Call-up—whether such actions, suits or proceedings are brought in the name of CMHC or in the name of the Standing Offer Holder or one of its employees, officers, agents or subcontractors.

4.3 No Limitation

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

4.4 Non-Compliance or Default by Standing Offer Holder

If the Standing Offer Holder fails to comply with a direction or decision of CMHC properly given under the terms of this Standing Offer or is in default in any other manner under this Standing Offer, CMHC may do such things and incur such costs as it deems necessary to correct

the Standing Offer Holder's default, including without limitation the withholding of payment due or accrued due to the Standing Offer Holder for services rendered pursuant to this Standing Offer 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.

4.5 Force Majeure

In the event that the Standing Offer Holder is prevented from fulfilling its obligations under the terms of a Call-up raised against this Standing Offer by a force majeure or act of Nature (an event or effect that cannot be reasonably anticipated or controlled), the Standing Offer Holder 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 Nature. 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 Nature, actions of public enemies, strikes, lockout and other labour disputes, riots, flooding, hurricane, fire, explosion or any other natural disasters over which the Standing Offer Holder has no reasonable control.

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

4.6 Compliance With Laws

The Standing Offer Holder shall give all the notices and obtain all the licenses and permits required to perform the work under a Call-up. The Standing Offer Holder shall comply with all the laws applicable to the work under a Call-up or the performance of this Standing Offer.

4.7 Laws Governing Standing Offer

This Standing Offer and any Call-up raised against this Standing Offer shall be governed by and construed in accordance with the federal laws of Canada and provincial laws as applicable therein. Failure by either party to assert any of its rights under a Call-up raised against this Standing Offer shall not be construed as a waiver thereof.

4.8 Independent Standing Offer Holder

The Standing Offer Holder shall act as an independent Standing Offer Holder for the purposes of this Standing Offer. It and its employees, officers and agents are not engaged as employees of CMHC. The Standing Offer Holder agrees to so advise its employees, officers, and agents. Without limiting the generality of the foregoing, the Standing Offer Holder shall retain complete control of and accountability for its employees and agents. The Standing Offer Holder 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 Standing Offer Holder.

4.9 Standing Offer Holder's Authority

The Standing Offer Holder 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 any way.

4.10 Corporation Identification

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

4.11 Moral Rights

The Standing Offer Holder warrants that the Standing Offer Holder is the only person who has or will have moral rights in the material created by the Standing Offer Holder and supplied under this Standing Offer and the Standing Offer Holder hereby transfers and assigns to CMHC all of the Standing Offer Holder's moral rights in the material, as provided for in the law of copyright. Upon the material coming into existence, the Standing Offer Holder agrees to execute any document requested by CMHC acknowledging such transfer and assignment.

4.12 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 Standing Offer, 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 Standing Offer Holder, any subcontractor, reseller, agent or any other person engaged to perform the Work under the Call-up.

The Standing Offer Holder 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 Standing Offer Holder further understands and agrees to treat all CMHC Information as proprietary, confidential and sensitive unless otherwise specifically agreed to in writing by CMHC. The Standing Offer Holder shall restrict access to CMHC Information to those persons who have a need to know this information in order to perform the Work under any Call-up raised against the Standing Offer.

Where disclosure of CMHC Information is required pursuant to a lawful requirement or for the purposes of complying with a subpoena or warrant lawfully issued or lawfully made by a court, person or body, the Standing Offer Holder shall notify CMHC promptly after discovering the potential of disclosure of the CMHC Information so that CMHC has the opportunity to seek a protective order or other appropriate remedy.

The Standing Offer Holder also agrees that in the event that disclosure of CMHC Information is required by a valid and applicable law, it shall, in co-operation with CMHC, do all things possible to prevent access to CMHC Information including but not limited to taking appropriate legal action against disclosure, providing information and other assistance in order for CMHC to take appropriate legal action against disclosure and ensuring that disclosure is strictly limited to the information lawfully requested.

4.13 House of Commons

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

4.14 Scope of Standing Offer

This Standing Offer 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 in the RFSO and in the Standing Offer Holder's response to the RFSO or herein attached as Specifications, Conditions and Addendum. In case of conflicts between the Standing Offer Holder's documents and CMHC's documents, the latter shall govern.

4.15 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 Standing Offer Holder's social insurance number and/or corporate identification number) in order to allow it to complete the T1204 supplementary slip. The Standing Offer Holder(s) will be required to complete and sign a Supplier - Direct Deposit and Tax Information Form (CMHC/SCHL 3085) prior to the award of any Call-up under this Standing Offer.

4.16 Conflict of Interest

- (a) The Standing Offer Holder and its principals, employees and agents shall avoid any conflict of interest during the term of this Standing Offer and any Call-up raised against this Standing Offer 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 Standing Offer Holder 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 Standing Offer Holder's duties to that third party and the Standing Offer Holder'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 Standing Offer and any Call-up against this Standing Offer. 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 Standing Offer Holder of an amount which, in the sole opinion of CMHC, constitutes reasonable payment for the partial performance of the Standing Offer Holder's obligations under the Call-up. Upon such payment, CMHC shall have no further obligation of any nature or kind to the Standing Offer Holder.
- (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 (2006) in order to derive a direct benefit from any Call-up which may arise from this Standing Offer.

4.17 Approval of Services

Before advancing any amount to the Standing Offer Holder, CMHC reserves the right to determine, in its sole and absolute discretion, whether the Services under a Call-up were performed to the satisfaction of CMHC. The method of approving the work done will be in writing through e-mail, fax or traditional mail as described in Statement of Services attached herein.

In the event the work under a Call-up is not acceptable to CMHC, CMHC may take such action as it deems necessary to correct the Standing Offer Holder's default, including, without limitation, the following:

- (a) direct Standing Offer Holder to redo the work or part of the section which was not completed to CMHC's satisfaction;
- (b) withhold payment due or accrued due to the Standing Offer Holder for services rendered pursuant to the Call-up under this Standing Offer;
- (c) set off any expenses incurred by CMHC in remedying the default or failures of Standing Offer Holder against payment for payment due or accrued due to the Standing Offer Holder with regards to any Call-up;
- (d) terminate this Standing Offer or any Call-up against this SO for default and/or seek indemnification from the Standing Offer Holder for losses suffered by CMHC as a result of such default.

4.18 Ownership

- (a) The contracted research and/or writing, permissions, and graphics 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 Standing Offer Holder 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 Standing Offer Holder during the course of execution of its duties under this 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.

4.19 Suspension of Services 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 Standing Offer Holder. If any such suspension, modification, change or addition shall result in an increase or decrease in the cost of the work, the price specified in the Call-up Against Standing Offer Form shall be adjusted accordingly provided that the Standing Offer Holder 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.

4.20 Insurance

(a) The Standing Offer Holder will provide and maintain Commercial General Liability Insurance for a limit of \$1,000,000 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,
- personal injury,
- Canada Mortgage and Housing Corporation to be added as additional insured, and
- Thirty (30) days prior written notice of cancellation to Risk Management Consultant, 700 Montreal Road, Ottawa, Ontario, K1A 0P7.

(b) The Standing Offer Holder 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 Standing Offer Holders' employees and Standing Offer Holders' contract employees (if applicable) as named insureds.

The Standing Offer Holder will provide a Certificate of Insurance at least five (5) days prior to the Standing Offer commencement confirming the above insurance policy and evidencing that coverage has been placed with an Insurer licensed to do business in Canada.

It shall be the sole responsibility of the Standing Offer Holder 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 fulfil its obligation under the Standing Offer. Any such additional insurance shall be provided and maintained by the Standing Offer Holder at its own expense.

4.21 Extras

Except as otherwise provided in this Standing Offer no payment for extras shall be made unless such extras and the price thereof have been authorized in writing by CMHC.

4.22 Standing Offer Holder/Corporation Relationships

The Corporation agrees that the Standing Offer Holder, in the normal course of its normal working relationship with other corporations, can indicate that the Standing Offer Holder has entered into a Standing Offer with the Corporation. The Standing Offer Holder agrees, however, that it will not, without the prior written consent of the Corporation, reveal or disclose any details concerning the contents of the project of this Standing Offer.

4.23 Deliverables

4.24.1 Reports, Chapters, Partial Chapters and other assigned work

- (a) Where a final report, chapter, partial chapter or other assigned work (called “work”) is to be prepared, it shall be in a form acceptable to CMHC and suitable for reproduction or publication. More particularly,
 - (i) the body of the work shall include the main factual and analytical information and policy recommendations shall be separated to minimize potential restriction;
 - (ii) policy recommendations and supporting materials (bibliographies, data, permissions for graphics etc.) shall be attached as appendices or separate monographs; and
 - (iii) the work shall stipulate that the copyright remains with CMHC.

The Standing Offer Holder will supply,

- (i) work that follows the assignment in the Call-up. Text will be in MS Word in one column, and figures will be supplied separately with data (if applicable) in either EXCEL or PowerPoint. Figures will be labelled sequentially, photographs or existing external graphics will have permissions to published attached; and
- (ii) one copy of all material of which CMHC has ownership and publication rights in the form in which it was used by the author.

(b) CMHC

- (i) is under no obligation to publish all or part of the work or its associated materials, reports, maps and other documents;
- (ii) has the right to edit or publish the work, in part or in its entirety;
- (iii) shall be the sole judge of those parts of the work, or those materials and reports that it considers for publication.

4.24 Final Standing Offer Form

It is understood and agreed that the terms and conditions set out in section 6.3 will, at CMHC's discretion, form part of any resultant Standing Offer and accordingly may be incorporated into and form part of any and all authorized Call-up(s) against a Standing Offer.

Article 5.0 - Standing Offer Administration

5.1 CMHC has assigned a Standing Offer administrator to oversee this Standing Offer and the Standing Offer Holder has named a counterpart representative. The Standing Offer Holder's representative will be responsible for providing scheduled status reports to the Standing Offer administrator or a designate. All notices and invoices shall be transmitted either by fax, e-mail or postal service to the party's authorized representative.

IN WITNESS WHEREOF this Offer has been signed by the duly authorized signing officers of the Standing Offer Holder. By submitting a response to the Request for Standing Offer, the Offeror agrees to the Terms & Conditions contained herein.

SECTION 7: APPENDICES

Appendix A: Certification of Submission Mandatory

_____ hereby:
Company Name Procurement Business Number (PBN)

1. offers to provide services and/or goods to CMHC, as described in this Offer, on an if, as and when needed basis, all in accordance with the Request for Standing Offers;
2. offers the terms as set out in this Offer, including any financial quotations, for a period of days indicated in Section 2.7 following the closing date;
3. certifies that, at the time of submitting this offer, 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;
4. represents and warrants that in submitting the Offer or performing the Call-Up under the Standing Offer, there is no actual or perceived conflict of interest; or identifies the following conflict of interest;
5. represents and warrants that in preparing the Offer, there was no actual or perceived unfair advantage due to the receipt of information regarding the RFSO that was not made available to other Offerors;
6. certifies that this Offer was independently arrived at, without collusion;
7. 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 Call-Up under the Standing Offer or favourable treatment under a Call-Up from a Standing Offer;
8. authorizes CMHC to conduct such investigation as it deems appropriate to verify the contents of the Offer;
9. certifies, unless explicitly outlined in the Offer, 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 Goods and/or Services;
10. agrees to comply with all of the terms and conditions outlined in the Standing Offer in an unaltered form for any subsequent Call-up;
11. agrees that, in the event of acceptance of this Offer, it will enter into a Standing Offer in accordance with the RFSO, and, upon entry into a Call-Up under a Standing Offer with CMHC, it will commit to providing the full scope of services identified in the Call-up and in accordance with the Standing Offer;
12. agrees that, all the materials produced under the terms of this RFSO shall be the exclusive property of CMHC, that CMHC shall have copyright therein; and will not reimburse the Offeror for costs associated with the work, travel or documents produced in response to this RFSO;
13. agrees that it and any other persons for which it is responsible, who are to perform the work as stated in this RFSO, at the request of CMHC will comply with security screening as deemed appropriate;
14. authorizes CMHC to perform a credit check and/or financial evaluation, as required.

Signed this _____ day of _____, 2013 at _____, Canada.

Corporations are not required to provide a corporate seal.

Corporation/Individual:

Signature of Signing Authority Name & Title of Signing Authority

Declaration: I have the authority to bind the company.

Appendix B: Evaluation Table

EVALUATION CRITERIA	A	B	C	D
	WEIGHT 100 Total	POINTS 1 to 10	UPSET SCORE	SCORE AxB
1. <i>Does the Offeror's designated researcher/writer have a university degree in an appropriate field of study?</i>	5		30	
2. <i>Does the Offeror's designated researcher/ writer have relevant housing experience?</i>	15		90	
3. <i>How long has the Offeror's researcher/writer worked as a researcher/writer?</i>	10		60	
4. <i>Does the Offeror's research/writer have relevant writing experience in the housing field?</i>	15		90	
5. <i>Are the three references provided and are they current and similar in size and scope to this RFSO?</i>	5		30	
6. <i>Pricing</i>	10		n/a	
7. <i>Are the two legible samples, each no more than 2 pages and each less than 2 years old?</i>	5		35	
8. <i>Do the samples provided show good use of grammar and spelling?</i>	10		70	
9. <i>Are the samples accurately and clearly written, and in plain language?</i>	10		70	
10. <i>Are the topics of the samples housing-related?</i>	10		70	
11. <i>Are the topics of the samples written in a similar style to the Canadian Housing Observer content?</i>	5		35	
TOTALS	100			

Appendix C: Mandatory Compliance Checklist

- | | |
|--|-------------|
| <input type="checkbox"/> Delivery Instructions and Deadline | Section 2.3 |
| <input type="checkbox"/> Offering Period | Section 2.7 |
| <input type="checkbox"/> Offeror's Qualifications | Section 4.4 |
| <input type="checkbox"/> Writing Samples | Section 4.4 |
| <input type="checkbox"/> Person designated to do the work and qualifications | Section 4.4 |
| <input type="checkbox"/> Response to Statement of Services | Section 4.5 |
| <input type="checkbox"/> Credit Check | Section 4.6 |
| <input type="checkbox"/> Pricing | Section 4.7 |
| <input type="checkbox"/> Certificate of Submission | Appendix A |