



# REQUEST FOR PROPOSAL

FOR

## *Web Redevelopment and Maintenance Services*

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Canada



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## **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 contract agreement with a vendor(s) (hereafter referred to as the “proponent(s)”) for the purpose of implementing and migrating the external facing Web Content Management System of its Granville Island website – granvilleisland.com from Drupal 6.x to Drupal 7.x

The annual value of this service is expected to range from \$75,000.00 to \$85,000.00 CDN, including all applicable taxes.

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, Minister for Democratic Reform, and Minister responsible for Canada Mortgage and Housing Corporation, the Honourable Pierre Poilievre.

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.

The administration, management and control of the revitalization of Granville Island was transferred to CMHC by Order-in-council in 1972, as CMHC was already deeply involved in as innovative housing development in the area and it had experience in urban renewal and the skilled resources necessary to carry out the challenge.

Granville Island in Vancouver is designed to attract local residents and visitors to meet, explore and experience a variety of cultural, recreational, educational, commercial and industrial activities, all year round. It is recognized as one of the most successful waterfront developments in North America.

Granville Island is comprised of 15.2 hectares (37.6 acres) of land area and 2.1 hectares (5.3 acres) of tidal water area, and represents a major public land holding in close proximity to downtown Vancouver. Situated in False Creek between the Burrard and Granville Bridges, it is adjacent to the marinas and aquatic activities of both False Creek and English Bay.

Map of Granville Island:



Granville Island is currently home to approximately 275 businesses and facilities which employ more than 2,500 people and generate in excess of \$130 million in economic activity.

## 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.

| <b>Date</b>    | <b>Activities</b>                          |
|----------------|--|
| July 15, 2015  | Request for Proposal issued                |
| July 29, 2015  | Submission of Questions Deadline           |
| August 5, 2015 | Submission Deadline                        |
| August 2015    | Evaluation and Selection of lead proponent |
| August 2015    | Finalize contract with lead proponent      |
| August 2015    | Contract award                             |
| September 2015 | 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 #201502124* 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. All registered times will be in accordance with the time CMHC computer servers receive the submission, not the time the proposal was sent by the proponent.\*

**\* Please be advised that E-BID has a size limitation 10 MB. It is advisable and recommended that proponents submit their proposal in multiple smaller files.**

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

Upon receipt of proposals, an automated confirmation will be issued to the sender's e-mail address. It is strongly recommended that proponents 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. Proponents should ensure that sufficient delivery time is allowed for proposals to be received.**



## Address for Delivery

Proposals, 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: RFP, file #201502124**

## Format

Proposals 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.

## Proposal Opening and Verification Period

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

## 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, on August 5, 2015*

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 to Camille Attia at [cattia@cmhc-schl.gc.ca](mailto:cattia@cmhc-schl.gc.ca)

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 **seven calendar days** 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 via 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 proponents to whom CMHC has issued this RFP on 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 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.

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

## **2.21 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.

## **2.22 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.

### **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 (7.3).

#### **3.3 Statement of Work**

Granville Island is seeking to implement Drupal 7.x as its external facing Web Content Management System migrating its content from Drupal 6.x.

The site will be hosted offsite in Canada, subject to CMHC's security standards. Hosting of Granville Island's website, granvilleisland.com, is not in the scope of this RFP.

The Granville Island website has approximately 2000 pages of static content (English and French) including 1 main website, and up to 3 microsites. The Granville Island website must be available 24 hours a day, seven days a week. CMHC requires expert services for the planning, implementation of responsive design, migration and training on Drupal 7. The supplier would be responsible for ongoing maintenance such as configuration, all patches, bug fixes, upgrades etc of Drupal 7.

The supplier will also be responsible for creating a plan for continuous improvement for granvilleisland.com that will be executed over the term of the contract. The process will have to fit into the externally hosted environment which may be provided by another vendor. The hosting and any associated migration work must be in Canada.

The contract must offer a documented level of service including:

- Ongoing monitoring to ensure the application status
- An ongoing work management platform such as Basecamp or equivalent to track documentation, projects, ongoing maintenance, emergency issues, etc.
- Phone and email access to support staff, with a guaranteed response time of 1 hour during normal business hours and 5 hours outside of normal business hours.

Granville Island has invested in the Drupal platform for its websites. No proposals that recommend a change of platform will be considered.



## **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 # | Item                          |
|-----------------|-------------------------------|
| 4.3             | Covering Letter               |
| 4.4             | Table of Contents             |
| 4.5             | Executive Summary             |
| 4.6             | Proponent's Qualifications    |
| 4.7             | Response to Statement of Work |
| 4.8             | Project Management Plan       |
| 4.9             | Financial Information         |
| 4.10            | Other Information             |
| 4.11            | 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 phone number and e-mail address
- (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 Executive Summary**

The proponent's proposal should include an executive summary highlighting the following:

- (a) A summary of the proponent's proposal, including key features of the proposal, features that make the proposal superior, innovations or cost-saving opportunities.
- (b) A brief statement of the proponent's qualifications to meet the need of CMHC.

#### **4.6 Proponent's Qualifications**

#### **Mandatory**

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

- (a) A description of the firm, its organization, number of full-time employees and service specialization.
- (b) Resumés for relevant project personnel
- (c) References: CMHC wishes to confirm the relevant experience and success that the Proponents have had deploying these solutions. The Proponents' references may be contacted for their level of satisfaction with the product's functionality and for post-implementation support. For each reference, the following, minimum information must be provided: name of the client organization, contact person name, title, telephone number (including area codes), and email address. The client objectives, scope of services provided, and the complexity of the project. Refer to the Introduction and Scope section of the Statement of Work for details on size and scope of this project.
  - (1) Provide three (3) client references for implementation services within the last five (5) years. The implementation must be for a Drupal Web Content Management solution.
  - (2) Provide a minimum of one (1) reference for the following categories:
    - implementation for a project of similar scope and complexity;
    - providing ongoing maintenance
- (d) Information about office location(s) answering these questions: If awarded this contract, which office would provide support services? How many personnel are located in this office and what is their specific experience with the proposed work?
- (e) Demonstrate significant experience with Drupal 7 platform
- (f) Demonstrate a clear understanding of how evolving technology and information platforms could affect Granville Island's business.

#### **4.7 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.

A response to the all the items below must be included in the Proponent submission.

There are several components to the requirements portion, the requirements are:

1. Functional Requirements
2. System Requirements

3. Migration Requirements
4. Support Requirements
5. Ongoing Maintenance Requirements
6. Continuous Improvement requirements

|     |   |
|-----|---|
| 1   | <b>Functional Requirements</b>  |
| 1.1 | Describe your experience with migrating a large website from Drupal 6, or earlier, into Drupal 7.   |
| 1.2 | Describe your experience in the implementation of responsive web site design within Drupal.   |
| 1.3 | Describe your strategy for migrating a large website from Drupal 6 into Drupal 7.   |
| 1.4 | Describe the process used to promote the website into production on an externally hosted website that may be within a managed-service environment.  |
| 1.5 | Describe the Quality Assurance processes used to ensure all content is migrated correctly and moved into production on an externally hosted website that may be within a managed-service environment.   |
| 1.6 | Describe your experience integrating with web analytics.  |
| 1.7 | Describe your years of experience in the planning and implementation of bilingual web sites into Drupal.  |
| 2   | <b>System Requirements</b><br>(CMHC will provide data, but will not provide hardware, software, or infrastructure)  |
| 2.1 | Describe your experience in supporting websites created in Drupal.  |
| 2.2 | Describe how website performance in Drupal is tuned and monitored. List the performance measurements and tests you use.   |
| 2.3 | The proponent should outline the process for system upgrades, patches, and maintenance cycles. The proponent must describe: <ul style="list-style-type: none"> <li>• How patches, upgrades and maintenance are implemented</li> <li>• How upgrades are communicated to clients,</li> <li>• Expected involvement of the clients in the upgrades.</li> <li>• Outline any staging environments that may exist, testing strategies, etc.</li> </ul> |
| 2.4 | Describe the Service Level options available for ongoing maintenance, such as upgrades, patches, web site redesigns, etc.   |
| 2.5 | The proposed solution must be accessible to the public through Internet Explorer 10+, Chrome, Safari and Firefox, at a minimum.   |
| 2.6 | Please provide the minimum level of browser version that you support for Internet Explorer, Chrome, Safari and Firefox.   |
| 3   | <b>Migration Requirements</b> Migration activities will take place in an environment provided by the proponent.   |
| 3.1 | The proponent should outline the data migration/conversion process that will be followed to ensure no loss of data or work product at contract initiation.  |

|          |   |
|----------|---|
| 3.2      | Describe the process for migration from conception to implementation, including QA and sign-off.<br>Include details regarding a project management plan that will indicate how you will manage design, meetings, change and availability. This plan would include provisions for keeping the website up to date with content changes made during the migration process.     |
| 3.3      | Describe the Help Desk services and availability. Summarize the breadth and depth of support for issues such as connectivity, functionality, security and forgotten passwords.  |
| 3.4      | Describe any initial on-site training to administrators and users, as well as initial technical support to assist with the setup of the proposed solution. Topics included in the training should include but not be limited to:<br>Creating IDs and passwords<br>System security details<br>General system functionality<br>Training materials, both hard copy and on-line |
| <b>4</b> | <b>Support Requirements</b>   |
| 4.1      | The proponent should outline the process for testing and applying patches or upgrades to Drupal including frequency.  |
| 4.2      | Describe the process for ongoing maintenance. Include details regarding how you will manage change, availability, meetings, etc.  |
| 4.3      | Describe the support team and problem escalation process, including positions such as 'primary point of contact', etc. Explain the role of each support team member in the problem escalation process.  |
| 4.4      | Describe the process for scheduled outages, maintenance and upgrades. Outline the consultation process with clients. Explain any mitigations in place to minimize disruption and impacts to the client.   |
| <b>5</b> | <b>Ongoing Maintenance Requirements</b>   |
| 5.1      | Administering and maintaining www.granvilleisland.com's Drupal platform: <ul style="list-style-type: none"> <li>• Regular and timely implementation of all relevant security updates</li> <li>• Regular and timely implementation of all relevant module updates</li> </ul>   |
| 5.2      | The renewal of all CMHC-Granville Island web addresses  |
| 5.3      | Search Engine Optimization for CMHC-Granville Island web addresses  |
| 5.4      | Coordinate with web hosting company to ensure security and minimum downtime for CMHC-Granville Island web addresses   |
| 5.5      | Coordinate with email service provider to ensure security and minimum downtime for granvilleisland.com email addresses  |
| 5.6      | Administering and maintaining the bilingual aspects of granvilleisland.com  |
| <b>6</b> | <b>Continuous Improvement Plan Requirements</b>   |
| 6.1      | The proponent should outline their process for planning and executing ongoing improvements to granvilleisland.com over the term of the contract.  |
| 6.2      | Describe the collaboration tools you would use to plan improvements with CMHC staff and other designated contractors.   |

|     |   |
|-----|---|
| 6.3 | On a regular basis, the contractor will work with Granville Island staff and other contractors to identify, strategize and execute planned improvements to granvilleisland.com and future technology opportunities in support of granvilleisland.com. |
| 6.4 | Work in consultation with Granville Island Marketing and Communications and other contractors to develop web marketing tools that could include campaign-driven micro-sites, interactive catalogues, etc.   |
| 6.5 | The creation of a content development and management plan as directed by Granville Island staff.  |

#### 4.8 Project Management Plan

**Mandatory**

The proponent shall describe its project management plan including;

- (a) Its project management approach and organizational structure, reporting levels, and lines of authority.
- (b) The methods used in ensuring quality of work, and response mechanisms in the case of errors, omissions, delays, etc.
- (c) Its status reporting methodology, detailing written and oral progress reporting methods.
- (d) The method it will use to ensure compliance with the work schedule.
- (e) Interface points with CMHC, interface mechanisms and how internal issues and difficulties will be resolved.

#### 4.9 Financial Information

**Mandatory**

##### 4.9.1 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.

##### 4.10 Other

The Proponent may provide other relevant information here, but is not obligated to.

#### 4.11 Pricing Proposal

**Mandatory**

The proponent must provide a response relative to the pricing of its proposed solution.

The proponent must submit a fixed (firm) price for all services outlined in the RFP. Including a fixed price for the migration from Drupal 6.x to Drupal 7.x and for the ongoing web maintenance and administration, using the following table as an example:

| <b><u>Project: Upgrade to Drupal 7.x</u></b> |                        |                    |              |
|--|------------------------|--------------------|--------------|
| <b>Services</b>                              | <b>Estimated Hours</b> | <b>\$ per hour</b> | <b>Total</b> |
| Example: Project Management                  | 15 hours               | \$100.00           | \$1,500.00   |

|   |                        |                    |                         |
|---|------------------------|--------------------|-------------------------|
| 1)  |                        |                    |                         |
| 2)  |                        |                    |                         |
| 3)  |                        |                    |                         |
| 4)  |                        |                    |                         |
| 5)  |                        |                    |                         |
| Total Estimated Hours:  |                        |                    | Total Estimated Cost:   |
| <b><u>Project: Continuous Improvement Plan</u></b>                |                        |                    |                         |
| <b>Services</b>   | <b>Estimated Hours</b> | <b>\$ per hour</b> | <b>Total</b>            |
| 1)  |                        |                    |                         |
| 2)  |                        |                    |                         |
| 3)  |                        |                    |                         |
| 4)  |                        |                    |                         |
| 5)  |                        |                    |                         |
| Total Estimated Hours:  |                        |                    | Total Estimated Cost:   |
| <b><u>Project: Training Services</u></b>                          |                        |                    |                         |
| <b>Services</b>   | <b>Estimated Hours</b> | <b>\$ per hour</b> | <b>Total</b>            |
| 1)  |                        |                    |                         |
| 2)  |                        |                    |                         |
| 3)  |                        |                    |                         |
| Total Estimated Hours:  |                        |                    | Total Estimated Cost:   |
| <b><u>Project: Monthly Web Administration and Maintenance</u></b> |                        |                    |                         |
| <b>Services</b>   | <b>Estimated Hours</b> | <b>\$ per hour</b> | <b>Total</b>            |
| 1)  |                        |                    |                         |
| 2)  |                        |                    |                         |
| 3)  |                        |                    |                         |
| 4)  |                        |                    |                         |
| 5)  |                        |                    |                         |
| Total Monthly Estimate:   |                        |                    | Total Monthly Estimate: |

The proponent must submit all pricing information that indicates how the fixed price was calculated.

In addition, the proponent will include a complete listing of applicable hourly rates for services that may be requested beyond the migration and monthly maintenance services.

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 Vendor 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 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", and a predefined scoring scale of 0 to 5, where "3" is deemed to meet most requirements. Once individual evaluations are complete, the Evaluation Committee will discuss and agree upon a final score for each proposal.



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

Each compliant proposal that meets the minimum upset scores in each category shall then be evaluated using the “ratio” evaluation process. The proposal with the lowest cost receives the maximum points allowed. All other proposals receive a percentage of the point available based on their relationship to the lowest. The proponent with the highest score will be named the lead proponent.

## **5.5 Financial Evaluation**

CMHC will carry out a credit check and/or a financial capacity 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. The financial evaluation will be based on the information supplied by the proponent as per Section 4.9 of this RFP.

## **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.

## **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.**

**PROPOSED CONTRACT**

**CMHC FILE No. 201502124**

**THIS AGREEMENT** made this \_\_\_\_ day of \_\_\_\_\_, 2015.

**BETWEEN**

CANADA MORTGAGE AND HOUSING CORPORATION  
Granville Island Administration Office  
1661 Duranleau Street, 2<sup>nd</sup> Floor  
Vancouver, British Columbia, Canada  
V6H 3S3

(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 expert services for the planning, implementation of responsive design, migration and training on Drupal 7. The Contractor is responsible for ongoing maintenance such as configuration, all patches, bug fixes, upgrades etc of Drupal 7.

**Article 2.0 - Term of the Agreement**

**2.1** This agreement shall be for a period of five years commencing on \_\_\_\_\_ and ending on \_\_\_\_\_.

**2.2** Notwithstanding article 2.1 above, CMHC shall conduct on an annual basis, an assessment of the Contractor's work performed for the past year and based on this assessment, at no less than sixty (60) days prior to each year's anniversary date of signing the agreement, CMHC will 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 rates attached as Schedule B.

Notwithstanding this however, CMHC's total financial liability under the terms and conditions of the agreement shall not exceed \$ \_\_\_\_\_ for the first year of the contract.

Proponents' pricing provided to CMHC in their submission, will form part of the contract and must be fixed for the term of the contract.

**3.2** The amount payable to the Contractor by CMHC pursuant to article 3.1 is exclusive 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 provincial sales tax (PST). 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 PST, 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 PST 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** 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.

**3.6** All invoices, notices and requests for payment must make reference to this contract by quoting **CMHC file number 201502124** and be forwarded to CMHC at the address listed on page one of this agreement.

## **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 six (6) months prior to expiration of this contract or on such earlier date as CMHC may request, or 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 British Columbia 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 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.

#### **4.16 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.



#### **4.17 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.

#### **4.18 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.

#### **4.19 Binding**

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

#### **4.20 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.

#### **4.21 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.

#### **4.22 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.

#### **4.23 Approval of Work**

Before advancing any amount to the Contractor, CMHC reserves the right to determine, in its sole and absolute discretion, whether the work was performed to the satisfaction of CMHC.

In the event the work is not acceptable to CMHC, CMHC may take such action as it deems necessary to correct the Contractor's default, including, without limitation, the following:

- a) direct Contractor 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 Contractor for services rendered pursuant to this Contract;
- c) set off any expenses incurred by CMHC in remedying the default or failures of Contractor against payment for payment due or accrued due to the Contractor;
- d) terminate this Contract for default and /or seek indemnification from the Contractor for losses suffered by CMHC as a result of such default.

#### **4.24 Ownership**

(a) Any 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.

#### **4.25 Insurance**

- (a) Commercial General Liability Insurance: The Proponent will provide and maintain Commercial General Liability insurance with an insurer licensed to do business in Canada with a limit of not less than \$5,000,000 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
  - personal Injury
  - broad form property damage
  - blanket contractual liability
  - employers liability (or confirmation that all employees including sub-contractors and independent contractors are covered by Workers Compensation)
  - non owned automobile liability
  - Canada Mortgage and Housing Corporation to be added as additional insured.
  - 30 days prior written notice of cancellation to CMHC Granville Island Administration Office, 1661 Duranleau Street, 2<sup>nd</sup> Floor, Vancouver, British Columbia V6H 3S3
  - contractors 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).

- (b) Automobile Insurance: The Proponent will provide and maintain Automobile Insurance with an insurer licensed to do business in Canada with limits of not less than \$2,000,000. Third Party Liability for all motor vehicles used by the Proponent in the performance of this Contract.
  
- (c) Technology Errors & Omissions Liability: The Proponent will provide and maintain Technology Errors & Omissions Liability insurance with an insurer licensed to do business in Canada with a limit of not less than \$2,000,000. The policy will provide 30 days prior written notice of cancellation to CMHC Granville Island Administration Office, 1661 Duranleau Street, 2<sup>nd</sup> Floor, Vancouver, British Columbia V6H 3S3. Coverage is to include Proponents and Service Providers employees and contract employees (if applicable) as named insured. The Proponent shall ensure that the policy is renewed continuously for a minimum period of two (2) years following the expiration or early termination of this Agreement.
  
- (d) Other conditions: If there are material changes in the scope of Services provided under this Agreement, CMHC may, via the Service Level Change Procedures, request changes to the minimum insurance coverages set out above.

All insurance policies required to be maintained by Proponent pursuant to Section 4.25 shall be primary with respect to this Agreement and any valid and collectible insurance of CMHC shall be excess of Proponent's insurance and shall not contribute to it.

All Certificate of Insurance shall mention that insurers will provide CMHC with at least thirty (30) days' written notice prior to cancellation of any insurance referred to under Section 4.25. In addition Proponent shall provide written notice to CMHC forthwith upon learning that an insurer described in Section 4.25 intends to cancel, or intends to make or has made a material change to, any insurance referred to in Section 4.25. A Certificate of Insurance meeting the above requirements shall be delivered to CMHC upon execution of this Agreement and for each renewal thereafter.

Without in any way restricting CMHC's direction to grant or withhold its consent to a request to subcontract pursuant to Section 4.25, the Proponent agrees that it shall contractually obligate any subcontractor or independent contractor retained in connection with this Agreement to maintain insurance against such risks and in such amounts that having regard to such subcontractor's or independent contractor's involvement in the provision of the Services could reasonably be expected to be carried by Persons acting prudently and in a similar business to that of such subcontractor or independent contractor.

It shall be the sole responsibility of the Proponent 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.

All insurance policies shall be provided and maintained by the Proponents at its own expense.

#### **4.26 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.

#### **4.27 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.

#### **4.28 Extras**

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

#### **4.29 Closure of CMHC Offices**

(a) Where services are being provided by the Contractor pursuant to this Agreement on CMHC premises and the premises become inaccessible due to evacuation or closure because of events or circumstances beyond the control of CMHC, and where the health or safety of persons on the premises may be reasonably determined by CMHC, in its sole judgment, to be at risk, payment to the contractor hereunder may be suspended or modified. Payment will be suspended in full after 48 hours written notice unless the Contractor provides satisfactory evidence to CMHC that the Contractor will continue to incur monetary obligations to others directly as a result of its undertakings under this Agreement and is unable to mitigate its losses due to such obligations. Based on such evidence and the extent to which the Contractor is able to mitigate,

CMHC may continue payment in full (subject to clause (b) below), or at a reduced amount, or suspend payment completely.

(b) Notwithstanding clause (a) above, if closure is continued beyond one calendar week, payment under this Agreement may be suspended in full immediately, on further written notice to the Contractor, until reopening permits the services to continue.

**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 e-mail or postal service to the party's authorized representative as follows:

**for CMHC;**

**Canada Mortgage and Housing Corporation  
Granville Island Administration Office  
1661 Duranleau Street, 2<sup>nd</sup> Floor  
Vancouver, British Columbia V6H 3S3**

**Phone: 604-666-6655**

**e-mail: \_\_\_\_\_**

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

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Phone: ( ) \_\_\_\_\_**

**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**

---

Name:  
Title:  
Date:

---

Janet Flowers  
General Manager, Granville Island  
Date:

**SCHEDULE "A"**

**TERMS OF REFERENCE**

To be completed upon contract negotiation.



**SCHEDULE "B"**

**MANNER OF PAYMENT**

To be completed upon contract negotiation.

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## 7 SECTION 7 APPENDICES

### APPENDIX A

### MANDATORY

#### 7.1 Certificate of Submission

\_\_\_\_\_, hereby:  
Company Name Procurement Business Number (PBN)

- 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 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 \_\_\_\_\_, 2015 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**

| <b>EVALUATION CRITERIA</b>  | <b>A</b>                    | <b>B</b>                 | <b>C</b>               | <b>D</b>             |
|---|-----------------------------|--------------------------|------------------------|----------------------|
|   | <b>WEIGHT<br/>100 Total</b> | <b>POINTS<br/>1 to 5</b> | <b>UPSET<br/>SCORE</b> | <b>SCORE<br/>AxB</b> |
| <b>Proponent's Qualifications – Section 4.6</b><br>In this section, the proponent should provide detailed information relative to the specifications listed in Section 4.6, Proponent Qualification                         | <b>25</b>                   |                          | <b>75</b>              |                      |
| <b>Response to Statement of Work – Section 4.7</b><br>In this section, the proponent should provide detailed information relative to the specifications listed in Section 3, The Statement of Work.                         | <b>50</b>                   |                          | <b>150</b>             |                      |
| <b>Project Management Plan – Section 4.8</b><br>In this section, the proponent should provide detailed information relative to the specifications listed in Section 4.8, Project Management Plan                            | <b>10</b>                   |                          | <b>30</b>              |                      |
| <b>Meets Upset Score</b>  | <b>Yes/No</b>               |                          |                        |                      |
| <b>Pricing Proposal – Section 4.11</b><br>The proposal with the lowest cost receives the maximum points allowed. All other proposals receive a percentage of the point available based on their relationship to the lowest. | <b>15</b>                   |                          |                        |                      |
| <b>TOTALS</b>   | <b>100</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's Qualifications    | Section 4.6  |
| <input type="checkbox"/> | Response to Statement of Work | Section 4.7  |
| <input type="checkbox"/> | Project Management Plan       | Section 4.8  |
| <input type="checkbox"/> | Financial Information         | Section 4.9  |
| <input type="checkbox"/> | Pricing Proposal              | Section 4.11 |
| <input type="checkbox"/> | Proposed Contract             | Section 6    |
| <input type="checkbox"/> | 7.1 Certificate of Submission | Appendix A   |