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Québec  
K1A 0S5  
Bid Fax: (819) 997-9776

**LETTER OF INTEREST**  
**LETTRE D'INTÉRÊT**

Comments - Commentaires

<b>Title - Sujet</b> RFI #3 regarding GCRSS	
<b>Solicitation No. - N° de l'invitation</b> 24062-140087/F	<b>Date</b> 2015-10-02
<b>Client Reference No. - N° de référence du client</b> 24062-140087	<b>GETS Ref. No. - N° de réf. de SEAG</b> PW-\$\$ZL-106-29531
<b>File No. - N° de dossier</b> 106zl.24062-140087	<b>CCC No./N° CCC - FMS No./N° VME</b>
<b>Solicitation Closes - L'invitation prend fin</b> <b>at - à 02:00 PM</b> <b>on - le 2015-10-19</b>	
<b>Time Zone</b> <b>Fuseau horaire</b> Eastern Daylight Saving Time EDT	
<b>F.O.B. - F.A.B.</b> <b>Plant-Usine:</b> <input type="checkbox"/> <b>Destination:</b> <input type="checkbox"/> <b>Other-Autre:</b> <input type="checkbox"/>	
<b>Address Enquiries to: - Adresser toutes questions à:</b> Sanford, Gordon	<b>Buyer Id - Id de l'acheteur</b> 106zl
<b>Telephone No. - N° de téléphone</b> (819) 956-4291 ( )	<b>FAX No. - N° de FAX</b> (819) 956-7179
<b>Destination - of Goods, Services, and Construction:</b> <b>Destination - des biens, services et construction:</b> TREASURY BOARD OF CANADA, SECRETARIAT RECEIVING RM P.155 300 LAURIER AVE - W OTTAWA Ontario K1A0R5 Canada	

Instructions: See Herein

Instructions: Voir aux présentes

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

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

**Issuing Office - Bureau de distribution**  
Special Projects/Projets Spéciaux  
11 Laurier St./11, rue Laurier  
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Gatineau  
Québec  
K1A 0S5

Solicitation No. - N° de l'invitation

24062-140087/F

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur

106z1

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

24062-140087

File No. - N° du dossier

106z124062-140087

CCC No./N° CCC - FMS No/ N° VME

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**REQUEST FOR INFORMATION**

**REGARDING**

**GOVERNMENT OF CANADA RELOCATION SUPPORT SERVICES**

**(GCRSS)**

**REQUEST FOR INFORMATION**  
**REGARDING**  
**GOVERNMENT OF CANADA RELOCATION SUPPORT SERVICES**

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Annex A: CAF Response to RFI #2 Industry Feedback

## **REQUEST FOR INFORMATION REGARDING GOVERNMENT OF CANADA RELOCATION SUPPORT SERVICES**

### **1. Purpose and Background of this Request for Information**

#### **(a) Purpose**

Based on industry feedback received during the recent Request for Information (RFI) #2 process that closed on August 31, 2015, Canada is providing further clarification of its anticipated requirements for the Government of Canada Relocation Support Services (GCRSS) procurement initiative.

#### **(b) Background**

The relocation services to be provided under GCRSS will replace a single integrated contract that currently supports the requirements of three parties, i.e. the Canadian Armed Forces (CAF), the Royal Canadian Mounted Police (RCMP), and federal public servants under the National Joint Council (NJC) who are represented by the Treasury Board of Canada Secretariat (TBS).

The GCRSS will be delivered through contracted service providers that administer the provision of relocation services to members of the CAF and to federal public servants under the NJC. The RCMP, and possibly other federal organizations, will require contracted services related to the provision of a Third-Party Service Provider directory.

The administration of relocation services could include but is not limited to: advisory services (e.g. information on relocation benefits, relocation planning, etcetera), financial claims processing, and creation and maintenance of a list of third party service providers (e.g. realtors, home inspectors, lawyers/notaries, etcetera) that includes service standards and ceiling prices.

Please note that the services do not include the physical movement of household furnishings and effects, which are managed under separate contracts.

The solution must be hosted and run by the contractor, and must satisfy all security requirements.

### **2. Nature of Request for Information**

This is not a bid solicitation. This RFI will not result in the award of any contract. As a result, potential suppliers of any goods or services described in this RFI should not reserve stock or facilities, nor allocate resources, as a result of any information contained in this RFI. Nor will this RFI result in the creation of any source list. Therefore, whether or not any potential supplier responds to this RFI will not preclude that supplier from participating in any future procurement. Also, the procurement of any of the goods and services described in this RFI will not necessarily follow this RFI. This RFI is simply intended to further inform industry with respect to the matters described in this RFI.

### **3. Nature and Format of Responses Requested**

Respondents may provide their comments, concerns and, where applicable, alternative recommendations regarding how the requirements or objectives described in this RFI could be satisfied. Respondents may also provide comments regarding the content, format and/or organization of any draft documents included in this RFI.

### **4. Response Costs**

Canada will not reimburse any respondent for expenses incurred in responding to this RFI.

## 5. Treatment of Responses

- (a) **Use of Responses:** Responses will not be formally evaluated. However, the responses received may be used by Canada to develop or modify procurement strategies or the draft Statements of Requirements related to this RFI. Canada will review all responses received by the RFI closing date. Canada may, in its discretion, review responses received after the RFI closing date.
- (b) **Review Team:** A review team composed of representatives of Canada will review the responses. Canada reserves the right to hire any independent consultant, or use any Government resources that it considers necessary to review any response. Not all members of the review team will necessarily review all responses.
- (c) **Confidentiality:** Respondents should mark any portions of their response that they consider proprietary or confidential. Canada will handle the responses in accordance with the *Access to Information Act*.
- (d) **Follow-up Activity:** Canada may, in its discretion, contact any respondents to follow up with additional questions or for clarification of any aspect of a response.

## 6. Format of Responses

- (a) **Cover Page:** If the response includes multiple volumes, respondents are requested to indicate on the front cover page of each volume the title of the response, the solicitation number, the volume number and the full legal name of the respondent.
- (b) **Title Page:** The first page of each volume of the response, after the cover page, should be the title page, which should contain:
  - i. the title of the respondent's response and the volume number;
  - ii. the name and address of the respondent;
  - iii. the name, address and telephone number of the respondent's contact;
  - iv. the date; and
  - v. the RFI number.
- (c) **Numbering System:** Respondents are requested to prepare their response using a numbering system corresponding to the one in this RFI. All references to descriptive material, technical manuals and brochures included as part of the response should be referenced accordingly.
- (d) **Number of Copies:** Canada requests that respondents submit one softcopy, in PDF format, of their response.

## 7. Enquiries

Because this is not a bid solicitation, Canada will not necessarily respond to enquiries in writing or by circulating answers to all potential suppliers. However, respondents with questions regarding this RFI may direct their enquiries to:

Contracting Officer: Gordon Sanford  
E-mail address: gordon.sanford@tpsgc-pwgsc.gc.ca

## 8. Submission of Responses

- (a) **Time and Place for Submission of Responses:** Any responses should be sent via e-mail to the Contracting Officer's e-mail address above, by October 12, 2015.
- (b) **Responsibility for Timely Delivery:** Each respondent is solely responsible for ensuring its response is delivered on time to the correct address.

## 9. Clarification of Planned Requirements

Canada's requirements remain a work in progress and industry should not assume that new clauses or requirements will not be added to any bid solicitation that may ultimately be published by Canada. Nor should industry assume that none of the clauses or requirements will be deleted or revised. Comments regarding any aspect of this RFI are welcome.

### (a) Compensation for Contractor's Services

It is envisioned that the contractor's sole compensation for the administration of relocation services rendered under the contract(s) will be payments from Canada for a firm all-inclusive price per relocation file. This price will be split into two components: an initial charge at the opening of a file; and the balance upon acceptance of file reconciliation.

This will be the only source of compensation for all relocation services described in the contract, excluding the possibility of additional work requirements, which may be required from time to time and would be subject to negotiation.

### (b) Third-Party Service Provider Charges

The contractor is not permitted to collect any fees such as commissions, referral fees, registration fees, or publication fees under any circumstances in connection with services provided under this contract from any realtors, agents, lawyers, notaries, or other service suppliers or employees.

Third-Party Service Provider (TPSP) charges paid by the contractor are subject to reimbursement at cost, i.e. no mark-up is allowed.

### (c) Use of the Third-Party Service Provider Directory

At any time both during and after the contract period, Canada has the right to use the contact information (e.g. names, addresses, email, and telephone numbers) of all organizations listed in the TPSP directory, for any purpose.

### (d) Arrange and Manage Subcontracts with TPSP

The contractor must arrange and manage various service agreements with TPSPs for services such as: realtors; lawyers; notaries; home inspectors; appraisers; and rental search agencies.

The contractor must ensure that any TPSP who wishes to participate in providing services are accepted into the directory as long as they are licensed or have the applicable certification to provide such services, and agree to provide the services in accordance with the terms of the contract.

The contractor must not refer transferees to specific TPSPs. However, in instances where the transferee requests a TPSP referral from the contractor, a minimum of three different TPSP names must be provided to the transferee for consideration, to the extent practical.

The contractor must continually add and recruit new TPSPs throughout the contract period. When a transferee selects a service provider that is not in the contractor's directory, the contractor must contact the service provider in order to provide it with the terms and conditions and invite the service provider to join the TPSP directory. The service provider is not required to join, but a supplier is not a TPSP, as defined in the contract, unless registered in the directory.

The contractor must provide all TPSP services at prices not exceeding the ceiling prices detailed in the contract, at any and all locations chosen by transferees.

Notwithstanding the above, in locations where it is not possible to engage a TPSP, the contractor must notify the Technical Authority named in the contract regarding efforts undertaken to establish such third-party services, and provide proposed solutions. Any TPSP that is removed

from the directory by the contractor or that voluntarily withdraws must be reported, with the reason(s) for the removal or withdrawal, on a semi-annual TPSP Exception Report.

**(e) TPSP Directory in English and French**

The TPSP directory must be available in both official languages and it would be beneficial if it indicated whether each TPSP provides services in English, French or both languages.

**(f) Financial Management of TPSPs**

The Contractor must provide all TPSP services at the prices detailed in the contract. If the contractor is only able to provide a TPSP service at a price above the ceiling price, the contractor is liable for the amount of the overage.

Transferees are free to select any service provider, whether listed in the directory or not, with the proviso that Canada will only reimburse actual expenses up to the applicable ceiling price. Should a transferee choose to use a supplier not listed in the TPSP directory, the amount reimbursable would be capped at the ceiling price specified in the directory, and the transferee is liable for any overage.

For TBS:

Financial management includes arranging, setting up and making all payments for all required TPSP services, unless otherwise requested by the transferee. The contractor will be required to perform invoice verification processing functions and provide payments to TPSP for services rendered.

For the CAF and RCMP:

The contractor is not responsible for the payment of TPSP services. It is envisioned that TPSP payments will be executed by transferees directly and processed in-house.

**(g) Third-Party Service Provider Directory for the RCMP**

The RCMP's TPSP requirements are, for the most part, expected to be the same as those described in this RFI, except that Canada envisions one of two pricing options for a stand-alone TPSP service for the RCMP:

- i. An annual fixed price subscription; or
- ii. A price per file for use of the directory

**(h) Centralized Advisory Services**

Although the CAF currently offers face-to-face relocation advisory services to its members under the terms of the outgoing contract, it is not a requirement of this procurement. Going forward, advisory services to transferees and their families will be conducted via an interactive, on-line application and, to a lesser degree, by recorded phone conversations that must be easily accessible by the Technical Authority.

**(i) Information Management Expenditure Tracking System (IMETS)**

IMETS is a generic acronym to describe an information management expenditure tracking system that a contractor would need to administer relocation files. It is expected that a bidder would already have its own system and that it would need to be modified to meet GCRSS requirements.

**(j) Relocation (Debit/Credit) Card**

At this time, a re-loadable Relocation (debit/credit) Card forms part of the CAF requirements but is not part of the NJC requirements.

(k) **Applicable Relocation Directives (Policies)**

To better understand the full scope of GCRSS requirements, suppliers need to be knowledgeable on the various relocation directives (policies), as they explain transferee benefits and entitlements. These directives can be found at:

- i. <http://www.njc-cnm.gc.ca/directive/index.php?did=6&lang=eng&merge=2> ; and
- ii. <http://www.forces.gc.ca/en/about-policies-standards-benefits-relocation/2011-2012-directive-toc.page> .

(l) **6-Month Ramp-up Period**

The feedback received from industry is that 3 to 6 months is a typical duration of a ramp-up (transition) period to take on significantly sized new clients, and 6 months is sufficiently long for any or all of the contemplated GCRSS contracts.



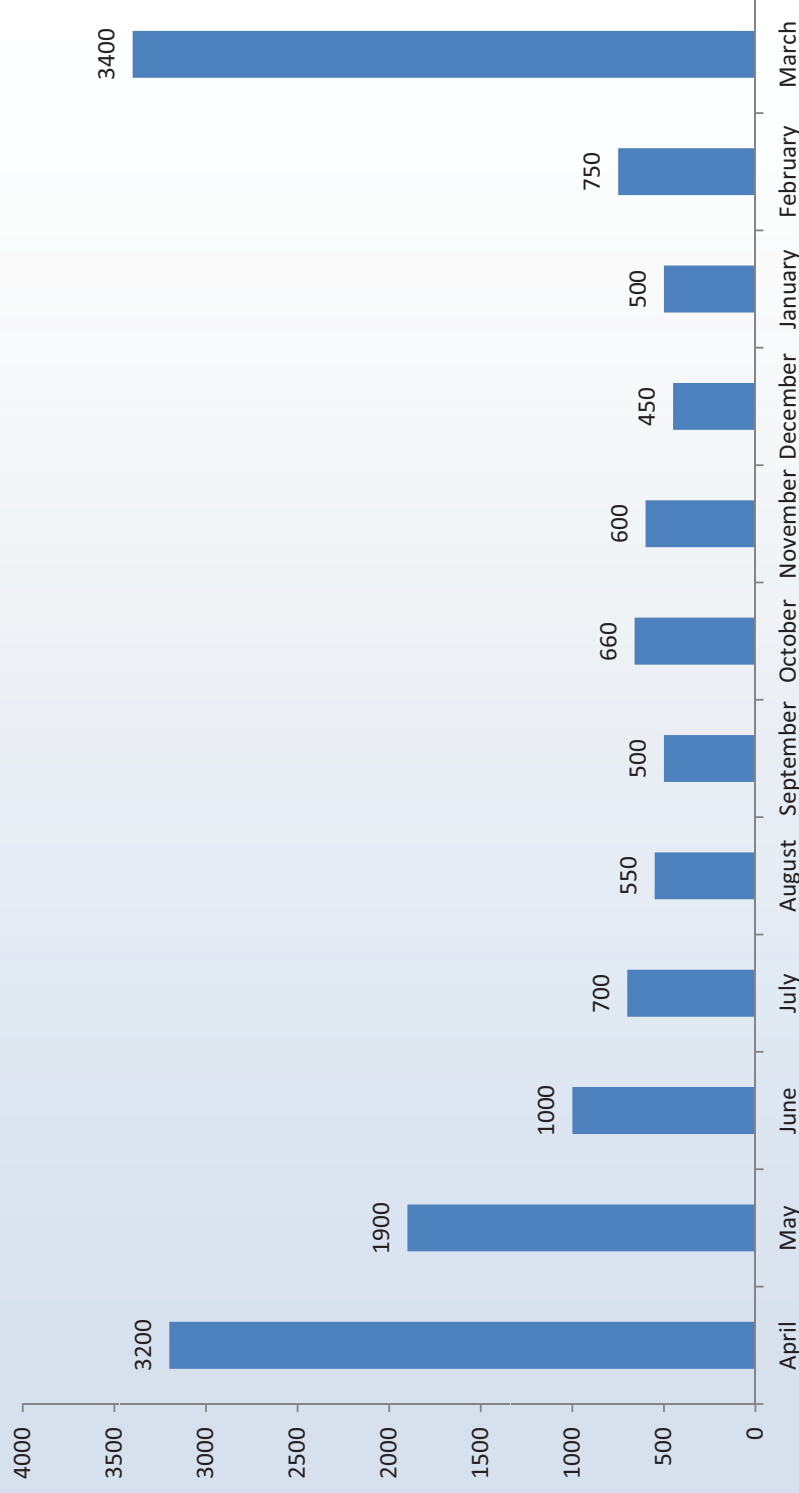
# Canadian Armed Forces Integrated Relocation Program (CAF IRP)



# Overview

- Historically, Canadian Armed Forces Relocations have been approx 10,000-15,000 per year

Average Authorized Moves Per Month Over 3 Years



# Overview

Domestic / International Moves From Origin - 3 Year Average

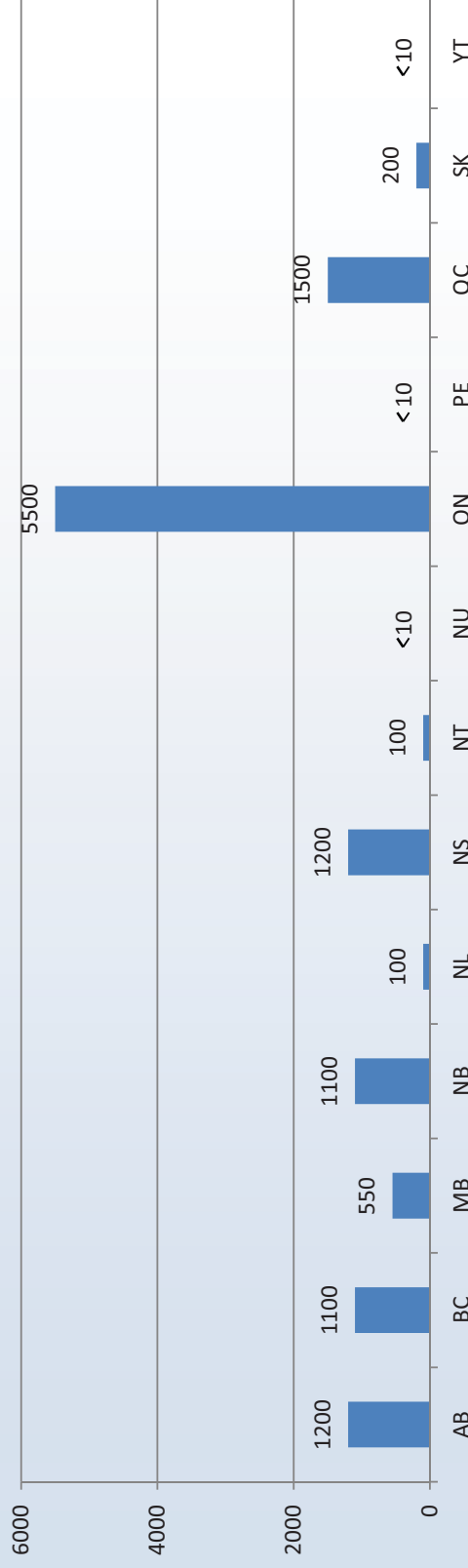


Domestic / International Moves To Destination - 3 Year Average

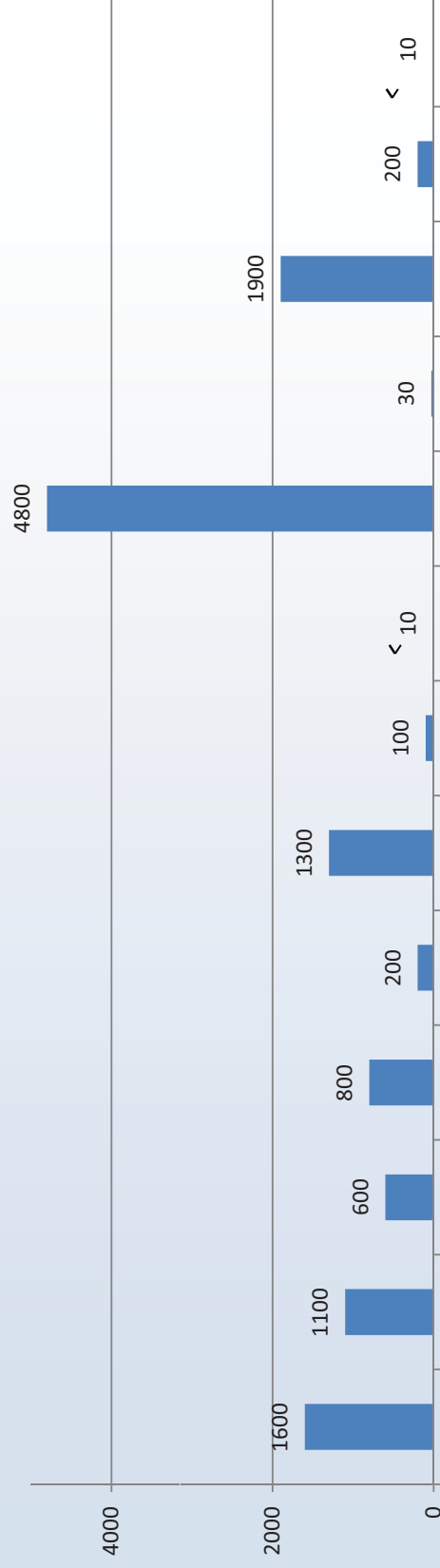


# Overview

Domestic Relocations From Origin Province - 3 Year Average



Domestic Relocations by Destination Province - 3 Year Average



# Mandate

As the Technical Authority and Single Point of Contact, Director Relocation Business Management (DRBM) is mandated to:

- Provide oversight of the Canadian Armed Forces Integrated Relocation Program (CAF IRP)
- Ensure eligibility of Transferees for CAF IRP benefits (authorize the Members to access IRP services)
- Ensure Contractor's administration/execution of policy, reimbursements and recoveries are in accordance with Treasury Board Policy (File Verifications) and
- Ensure Contractor provides efficient Service Delivery to all Members and their families throughout the relocation process

# Mandate

- To provide oversight of the CAF IRP, Director Relocation Business Management (DRBM) conducts file and transaction verifications:
  - A file verification includes the complete relocation file, with all transactions and receipts
  - Historically, file verifications have been approximately 1000 per year

# Mandate

- To ensure Contractor's administration/execution of policy, reimbursements and recoveries are in accordance with Treasury Board Policy:
  - In addition to file verifications, reviews of daily transactions are executed
  - The number of daily transactions will fluctuate from less than 10 to more than 8000, depending upon the time of year
  - When available, transaction verifications are typically 30 per day
  - The selected transactions, including all receipts and supporting documentation, are reviewed.

# The Proposed Course of Action

- Move away from face-to-face service delivery to a virtual, recordable technology based service
- Increase access to relocation information for members and their family through web based technology for example, on-line General Briefing Sessions (GBS's)
- Receive all relevant information pertaining to taxable benefits from contractor
- Canadian Armed Forces to issue the T4s/RL1s to the Member after Contractor provides information



# The Proposed Course of Action

Pre-loaded Declining Balance Relocation Card / Electronic Method of Funds Transfer

- Contractor to determine and issue declining balance to Transferee in accordance with policy
- The available balance to be adjusted at various stages throughout the relocation period as required

# Canadian Armed Forces IRP Directive

The following link to the current CAF IRP directive can provide further information

**[http://www.forces.gc.ca/assets/FORCES\\_Internet/docs/en/about-policies-standards-benefits-relocation/relocation-directive-2009-2015.pdf](http://www.forces.gc.ca/assets/FORCES_Internet/docs/en/about-policies-standards-benefits-relocation/relocation-directive-2009-2015.pdf)**