



REQUEST FOR STANDING OFFER

FOR

REQUEST FOR STANDING OFFER FOR EVALUATION AND
HOUSING RESEARCH SERVICES

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Research

Inquiries: Monika Morrison
Senior Procurement Advisor

Email: mmorriso@CMHC.ca
Fax: (613) 748-2554

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Canada



TABLE OF CONTENTS

1	SECTION 1 GENERAL INFORMATION.....	1
1.1	OVERVIEW OF SECTION 1	1
1.2	INTRODUCTION AND SCOPE	1
1.3	CMHC BACKGROUND.....	1
1.4	PURPOSE OF REQUEST FOR STANDING OFFERS (RFSO)	1
1.5	SCHEDULE OF EVENTS.....	2
1.6	TERMS AND CONDITIONS OF STANDING OFFER AND ANY RESULTING CALL-UP.....	2
1.7	RFSO POTENTIAL SERVICE PROVIDERS	2
1.8	INCOME TAX REPORTING REQUIREMENT	2
1.9	PROCUREMENT POLICY RE: THE ENVIRONMENT.....	3
1.10	CALL-UPS AGAINST A STANDING OFFER	3
1.11	QUANTITY	3
2	SECTION 2 INSTRUCTIONS, TERMS AND CONDITIONS FOR SUBMITTING AN OFFER IN RESPONSE TO THIS REQUEST FOR STANDING OFFER (RFSO)	4
2.1	OVERVIEW OF SECTION 2	4
2.2	CERTIFICATE OF SUBMISSION MANDATORY	4
2.3	DELIVERY INSTRUCTIONS AND DEADLINE.....	4
2.4	INQUIRIES	5
2.5	COMMUNICATION	6
2.6	OFFEROR CONTACT	6
2.7	OFFERING PERIOD	6
2.8	CHANGES TO OFFER	6
2.9	LIABILITY FOR ERRORS	6
2.10	VERIFICATION OF OFFEROR’S OFFER.....	6
2.11	OWNERSHIP OF OFFERS	7
2.12	PROPRIETARY INFORMATION	7
2.13	CORPORATION IDENTIFICATION.....	7
2.14	DECLARATION RE: GRATUITIES	7
2.15	CONFLICT OF INTEREST	7
2.16	DECLARATION RE: BID RIGGING AND COLLUSION	8
2.18	INTELLECTUAL PROPERTY RIGHTS	8
2.19	NON-DISCLOSURE OF CMHC INFORMATION.....	8
2.20	OFFEROR’S PROCUREMENT BUSINESS NUMBER (PBN).....	9
2.21	COSTS ASSOCIATED WITH THE PREPARATION OF OFFERS	9
	SECTION 3 STATEMENT OF GOODS AND/OR SERVICES TO BE COVERED UNDER THE STANDING OFFER (SO)	10
3.1	OVERVIEW OF SECTION 3	10
3.2	STATEMENT OF GOODS AND/OR SERVICES	10
4	SECTION 4 OFFER REQUIREMENTS.....	18
4.1	OVERVIEW OF SECTION 4	18
4.2	COVERING LETTER	18
4.3	OFFEROR’S QUALIFICATIONS MANDATORY	18
4.4	RESPONSE TO STATEMENT OF GOODS AND/OR SERVICES MANDATORY.....	19
4.5	PROJECT MANAGEMENT PLAN MANDATORY.....	19
4.6	PRICING MANDATORY	19
	SECTION 5 EVALUATION AND SELECTION	21
5.1	OVERVIEW OF SECTION 5	21
5.2	LIMITATION OF DAMAGES	21

5.3	EVALUATION TABLE	21
5.4	EVALUATION METHODOLOGY	21
5.5	OFFEROR SELECTION	22
6	SECTION 6: TERMS AND CONDITIONS OF STANDING OFFER AND ANY RESULTING CALL-UPS FROM THIS STANDING OFFER	23
6.1	STANDING OFFER	23
6.2	MANDATORY TERMS AND CONDITIONS	23
	SECTION 7: APPENDICES	24
APPENDIX A:	STANDING OFFER AND ANY RESULTING CALL-UP TERMS AND CONDITIONS	24
APPENDIX B:	CERTIFICATION OF SUBMISSION	34
APPENDIX C:	EVALUATION TABLE	35
APPENDIX D:	MANDATORY COMPLIANCE CHECKLIST	37

1 SECTION 1 GENERAL INFORMATION

1.1 Overview of Section 1

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

1.2 Introduction and Scope

The Canada Mortgage and Housing Corporation (CMHC) wishes to enter into Standing Offers (SOs) with a selection of vendors (hereinafter referred to as “offerors”) for the purpose of completing evaluation and housing research services for CMHC. The duration of these Standing Offers will be for two (2) years, with option to renew for 1 (one) year, for a total of three (3) years. The total dollar value of resulting Call-ups from this Standing Offer (SO) will not exceed \$3,000,000.

More detailed specifications can be found in Section 3, “Statement of Goods and/or Services”

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.

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

1.4 Purpose of Request for Standing Offers (RFSO)

CMHC will use this Request for Standing Offer (RFSO) to retain a source list of professional services to CMHC’s Corporate Development, Policy and Research sector in 2 streams of services: 1) Program Evaluation and 2) Research (with 4 parts: Socio-Economic, Technical, Finance and Market Analysis. Qualified Offerors are to provide the goods and/or services outlined herein on an “as-and-when requested” basis. In a RFSO process, offers and offerors are qualified in terms of ability to satisfy the stated mandatory criteria, while also providing pricing for the goods and/or services that will be provided to CMHC.

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

1.5 Schedule of Events

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

Date	Activities
October 23, 2015	Request for Standing Offer (SO) issued
November 13, 2015	Submission of questions deadline
November 20, 2015	Offer Submission deadline
November 2015	Evaluation and selection of Standing Offer (SO) holders
November 2015	Announcement of successful SO holders
As requested	Debriefing of unsuccessful SO Offerors

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

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

1.7 RFSO Potential Service Providers

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

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

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

1.8 Income Tax Reporting Requirement

As a federal Crown Corporation, CMHC is obliged under the Income Tax Act and Regulations to report payments made by the Corporation to 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 Standing Offer Holders will be

required to complete and sign a Supplier - Direct Deposit and Tax Information Form (CMHC/SCHL 3085) prior to execution of any Call-up resulting from this RFSO.

1.9 Procurement Policy Re: The Environment

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

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

1.10 Call-ups Against a Standing Offer

Call-ups against this Standing Offer will be on an as-and-when-required basis. CMHC does not guarantee that any successful Offeror under this Standing Offer will in fact be awarded a Call-up. Upon being called up, any Offeror may accept or decline the proposed work.

Offeror selection for Call-ups against this SO will be based on the nature of the project, the specific expertise required for the project and availability of the Offeror.

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

The Offeror may accept or decline the assignment.

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

1.11 Quantity

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

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

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

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

2.1 Overview of Section 2

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

2.2 Certificate of Submission

Mandatory

Offerors must submit a signed Certificate of Submission as part of their offer. The Certificate of Submission, located in Appendix B, summarizes the mandatory requirements set out in the RFSO. Should an Offeror not include the signed Certificate of Submission the Offeror will be notified by CMHC and given 48 hours in which to meet this requirement. The Certificate of Submission is located in Appendix B.

2.3 Delivery Instructions and Deadline

Timely and correct delivery of offers to the exact specified proposal delivery address is the sole responsibility of the Offeror. All risks and consequences of incorrect delivery of offers are the responsibility of the Offeror. CMHC will not assume or have transferred to it those responsibilities. All registered times will be in accordance with the time CMHC computer servers receive the offer, not the time the offer was sent by the offerors.*

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

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

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

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

Address for Delivery

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

EBID@cmhc-schl.gc.ca

The subject line of the transmission must state: RFSO, file #201503386

Format

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

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

Offer Opening and Verification Period

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

Offer Submission Deadline

Mandatory

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

2:00 p.m. EST(local Ottawa time), on November 20, 2015.

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

2.4 Inquiries

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

*Monika Morrison
Senior Procurement Advisor
mmorriso@cmhc.ca*

Information given verbally by any person within CMHC shall not be binding upon CMHC. Offerors must have written confirmation from CMHC for any changes, alterations, etc., concerning this RFSO. CMHC cannot guarantee a reply to inquiries received less than seven (7) calendar days prior to the closing date.

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

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

2.5 Communication

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

2.6 Offeror Contact

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

2.7 Offering Period

All responses MUST provide that the terms of the response including the pricing offer, shall remain valid and binding on the Offeror for a period of **60 days** following the closing date.

2.8 Changes to Offer

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

2.9 Liability for Errors

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

2.10 Verification of Offeror’s Offer

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

2.11 Ownership of Offers

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

All information regarding the terms and conditions, financial and/or technical aspects of the Offeror's offer, which, in their opinion, are of a proprietary or confidential nature, must be clearly marked "**PROPRIETARY**" or "**CONFIDENTIAL**" at **each item** or at the **top of each page**. Offerors' documents and information so marked will be treated accordingly by CMHC. Notwithstanding the foregoing, Offerors are advised that as a Crown corporation, CMHC is subject to the federal legislation with respect to access to information and privacy.

Information submitted by third parties will be protected or may be required to be disclosed in specific circumstances pursuant to the federal legislation.

2.12 Proprietary Information

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

2.13 Corporation Identification

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

2.14 Declaration re: Gratuities

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

2.15 Conflict of Interest

- (a) The Standing Offer (SO) Holder and its principals, employees and agents shall avoid any conflict of interest during the term of this Standing Offer and shall immediately declare any existing, potential or apparent conflict and shall, upon direction of CMHC, take steps to eliminate any conflict or perception that a conflict of interest exists.
- (b) The SO Holder must not provide any services to any third party in circumstances that might reasonably give rise to a conflict of interest, including a conflict between the SO Holder's duties to that third party and the SO Holder's duties to CMHC.
- (c) In the event that a conflict of interest, real or perceived, cannot be resolved to the satisfaction of CMHC, CMHC shall have the right to immediately terminate the Standing Offer and any

outstanding Call-ups resulting from the SO. All portions of the Services which have been completed at the date of termination of any Call-up resulting from the SO shall be forwarded to CMHC and CMHC shall be liable for payment to the SO Holder of an amount which, in the sole opinion of CMHC, constitutes reasonable payment for the partial performance of the SO Holder's obligations under the Call-up. Upon such payment, CMHC shall have no further obligation of any nature or kind to the SO Holder.

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

2.16 Declaration re: Bid Rigging and Collusion

In submitting its offer, the Offeror certifies that:

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

2.18 Intellectual Property Rights

All information and materials produced under any Call-up resulting from this Standing Offer shall be the exclusive property of the Offeror and the Offeror shall have copyright therein. Without restricting the scope of any license or other right that CMHC may otherwise hold, the Offeror hereby grants to CMHC an exclusive, perpetual, irrevocable, fully-paid and royalty-free right and license to use all or part of the information and materials produced under any Call-up resulting from this Standing Offer world-wide, with the right to modify the information or materials for any purpose related to the current or future operations of CMHC. The license so granted shall survive the termination of the Standing Offer.

2.19 Non-Disclosure of CMHC Information

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

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

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

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

2.20 Offeror's Procurement Business Number (PBN)

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

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

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

2.21 Costs Associated with the Preparation of Offers

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

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

SECTION 3 STATEMENT OF GOODS AND/OR SERVICES TO BE COVERED UNDER THE STANDING OFFER (SO)

3.1 Overview of Section 3

This section of the RFSO is intended to provide Offerors with the information necessary to develop a qualifying offer. The Statement of Goods and/or Services is a complete description of the goods and/or services that may be required under this SO.

3.2 Statement of Goods and/or Services

CMHC wishes to retain vendors to provide Evaluation Services (Stream 1) and Research Services (Stream 2). Offerors may respond to one or both streams, and should indicate clearly in their proposal their specialized areas of expertise and any specialized knowledge areas.

Evaluation Services (Stream 1)

Evaluation provides a comprehensive and reliable base of evidence to support policy and program improvements, expenditures management and accountability reporting. Evaluation projects are undertaken periodically for CMHC programs, initiatives, and activities designed and delivered to meet a public objective.

The Offerors must have a comprehensive knowledge of the Treasury Board Program Evaluation Policy. Demonstrated competencies and experience in using evaluation methods and approaches and demonstrated accomplishments in value-for-money evaluations, and return on investment type data collection and analysis is required. Ability to work in both official languages is considered an asset, however for some projects contracted under this RFSO, the ability to work in both French and English will be required.

The required services may include but are not limited to:

- Assessing the readiness of a policy, program or initiative to be evaluated;
- Assessing the relevance and performance of programs, policies and initiatives;
- Planning specific evaluations or related studies of individual or clusters of programs, policies or initiatives;
- Developing terms of reference for evaluation projects;
- Preparing logic models, program theories/theories of change or assessment tools;
- Constructing work plans, including evaluation planning reports or frameworks and associated methodologies;
- Developing, testing and implementing evaluation methods and data collection tools including surveys, interview guides, focus group discussions, case studies;
- Conducting document reviews, literature reviews and administrative data reviews;
- Analyzing both qualitative and quantitative data;
- Validating evaluation approaches, methodologies, findings, conclusions and recommendations;

- Developing evaluation reports or associated products (briefing materials, presentations, technical reports) containing findings, conclusions and recommendations;
- Conducting and writing synthesis or meta-evaluations;
- Assisting with the compilation, analysis and dissemination of findings, lessons learned and best practices;
- Briefing staff and management on results and findings; and,
- Assisting with the writing of other materials, documents, tools and instruments related to the work.

Minimum Mandatory Qualifications and Experience:

It is expected that up to three (3) categories of personnel will be required for the Evaluation stream, depending on the project size. The functions of these personnel are summarized as follows:

Project Manager/Team Leader: (large projects only)

Responsible for and manages the project and project team, ensuring that the project is developed, performed and completed within the agreed upon time, resources (including cost) and performance parameters. Has lead role in overall quality assurance for the project.

Senior Evaluator:

Develops, designs, and carries out significant segments of projects of medium to high levels of complexity. Has lead role in analysis and preparation of reports.

Evaluator:

Organizes and conducts activities for evaluation and research projects, gathers data, conducts analysis, prepares draft reports.

Required Education/Experience

All team members must possess the following:

- A graduate or post-graduate university degree, preferably in the social sciences, economics, or related field(s);
- Knowledge of social science and evaluation theories, analytical approaches, and empirical research methods;
- Ability to use computer systems and relevant data management and analytical software, including SPSS and SAS;
- Canadian Evaluation Society (CES) Credentialed Evaluator (CE) designation preferred.

In addition to the above requirements, the specific personnel require the following education/experience:

Project Leader:

- A minimum of five (5) years hands-on experience in managing relevant projects;
- Experience managing at least five (5) large projects/assignments related to evaluation.

Senior Program Evaluator:

- At least five (5) years experience relevant to evaluation;
- Experience on at least five (5) projects/assignments related to evaluation.

Program Evaluator:

- At least three (3) years experience relevant to evaluation;
- Experience working on at least three (3) projects/assignments related to evaluation.

Research Services (Stream 2)

There are four distinct research areas for which services are required under this stream: Socio-Economic, Technical, Housing Finance and Housing Markets Analysis. Offerors must have a comprehensive knowledge of the research process and research methodologies and demonstrated competence in quantitative and qualitative analysis, communicating the results of research, as well as demonstrated specialized knowledge and experience in each of the research areas to which they are applying.

Ability to work in both official languages is considered an asset, however for some projects contracted under this RFSO, the ability to work in both French and English will be required.

The four (4) areas of research services are outlined as follows:

(A) Socio-economic Research

Specialized knowledge in one or more of the areas of social and affordable housing (Canadian and International), housing policy and policy instruments (Canadian and International), housing outcomes, senior's housing, adaptable and accessible housing, Aboriginal housing and other distinct housing needs. The required services may include, but are not limited to:

- Planning specific studies;
- Developing terms of reference for projects;
- Constructing work plans, including planning reports or frameworks and associated methodologies;
- Developing and testing data collection tools and conducting data collection including surveys, interviews, focus groups;
- Developing case studies on a variety of housing topics;
- Conducting literature searches and reviews, document reviews and administrative data reviews;
- Analyzing both qualitative and quantitative data for trends, anomalies, correlations, thresholds, etc.;

- Validating research approaches, methodologies, findings, conclusions and recommendations;
- Developing reports or associated products (e.g. briefing materials, presentations, technical reports) containing findings, conclusions and recommendations;
- Assisting with the compilation, analysis and dissemination of findings, lessons learned and best practices;
- Briefing CMHC staff and management on research findings; and,
- Assisting with the writing of other materials, documents, tools and instruments related to the research.

(B) Technical Research

Specialized knowledge in one or more of the areas of: design, construction, operation, maintenance, renovation and renewal of low and high-rise housing to achieve higher performing housing in terms of affordability (capital and operating costs), energy efficiency, indoor air quality, space flexibility and adaptability, durability, resource efficiency and environmental impact; building modelling and simulations, testing and evaluation; understanding of unique technical challenges of housing in northern and remote locations; housing industry in terms of its major stakeholders, industry skills development, building regulations, codes and standards. The required services may include, but are not limited to:

- Planning technical research studies;
- Developing terms of reference for projects;
- Creating technical research work plans, including reports, frameworks methodologies and outputs;
- Developing and testing data collection methods and tools and conducting data collection including, occupant evaluations, surveys, interviews, focus groups;
- Modelling simulations of housing performance, utility bill analysis, characterization of energy and water consumption performance;
- Development of case studies on the application of technologies, practices in housing;
- Developing tests and methodologies for building performance monitoring, technology assessments, data collection, analysis and evaluation;
- Conducting environmental scans, literature reviews, document reviews including comparative research on technical housing issues nationally and internationally;
- Analyzing both qualitative and quantitative data for trends, anomalies, correlations, thresholds, etc.;
- Preparing, developing and validating research approaches, methodologies, findings, conclusions and recommendations;

- Developing reports or associated products (e.g. technical reports, research highlights, presentations, training materials) containing findings, conclusions and recommendations;
- Assisting with the planning, compilation, analysis and dissemination of findings, lessons learned and best practices;
- Assisting with the writing of other materials, documents, tools and instruments related to the work;
- Facilitating integrated design charrettes, integrated design processes; and,
- Documenting the application of innovative technologies and practices in housing.

(C) Housing Finance Research

Specialized knowledge in one or more of the areas of Housing Finance is required to qualify under this stream; topic areas include the lending sector, housing economics and finance, securitization, the regulatory framework (e.g., OSFI, BIS), macro-prudential regulation and policy, mortgage guarantees and role of government and the private sector in housing finance. Applicants to this area of research must demonstrate specialized knowledge in economics, credit risk, financial markets, and financial product innovation analysis. The required services may include, but are not limited to:

- Planning specific studies;
- Developing terms of reference for projects;
- Constructing work plans, including planning reports or frameworks and associated methodologies;
- Developing and testing data collection tools and conducting data collection including surveys, interviews, focus groups and case studies;
- Conducting literature reviews, document reviews and administrative data reviews;
- Analyzing both qualitative and quantitative data; Validating research approaches, methodologies, findings, conclusions and recommendations;
- Developing reports or associated products (e.g. briefing materials, presentations, technical reports) containing findings, conclusions and recommendations;
- Assisting with the compilation, analysis and dissemination of findings, lessons learned and best practices; and,
- Assisting with the writing of other materials, documents, tools and instruments related to the work.

(D) Housing Market Analysis Research

Requires specialized knowledge in one or more of areas such as: economic and statistical analysis/models, housing market analysis (including forecasting models), house price indices and

forecasts, retail/consumer credit and mortgage insurance models. The required services may include but are not limited to:

- Planning specific studies;
- Developing models (economic/statistical/econometric);
- Developing terms of reference for projects;
- Developing work plans, including planning reports or frameworks and associated methodologies;
- Developing and testing data collection tools and conducting data collection including surveys, interviews, focus groups and case studies;
- Conducting literature reviews, document reviews and administrative data reviews;
- Analyzing both qualitative and quantitative data;
- Validating research approaches, methodologies, findings, conclusions and recommendations;
- Developing reports or associated products (e.g. briefing materials, presentations, technical reports) containing findings, conclusions and recommendations;
- Assisting with the compilation, analysis and dissemination of findings, lessons learned and best practices;
- Briefing staff on the results of findings; and,
- Assisting with the writing of other materials, documents, tools and instruments related to the work.

Minimum Mandatory Qualifications and Experience:

It is expected that up to three categories of personnel will be required for the Research Services stream, depending on the project size. The functions of these personnel are summarized as follows:

Project Manager/Team Leader: (large projects only)

Responsible for and manages the project and project team, ensuring that the project is developed, performed and completed within the agreed upon time, resources (including cost) and performance parameters. Has lead role in overall quality assurance for the project.

Senior Researcher:

Develops, designs, and carries out significant segments of projects of medium to high levels of complexity. Has lead role in analysis and preparation of reports.

Researcher:

Organizes and conducts activities research projects, gathers data, conducts analysis, prepares draft reports.

Required Education/Experience

(A) Socio-economic Research

- A graduate or post-graduate university degree, preferably in the social sciences, economics and related fields.
- Knowledge of social science theories, analytical approaches, and empirical research methods; and,
- Ability to use computer systems and relevant data management and analytical software, including SPSS, SAS, EVIEW, or other statistical software.

(B) Technical Research

- A graduate or post-graduate university degree - planning, architecture and engineering, and building science;
- Knowledge of building science theory, education and practice; and,
- Ability to use computer systems and relevant data management and analytical software including Computer Aided Design applications (E.g. AutoCAD, ArchiCAD, building performance modelling and analysis).

(C) Housing Finance Research

- A graduate or post-graduate university degree, in the Social Sciences or a Business-related field (Business Admin, Finance, Financial Economics, MBA etc);
- Knowledge of social science theories, analytical approaches, and empirical research methods;
- Ability to use computer systems and relevant data management and analytical software, including SPSS and SAS; and,
- Chartered Financial Analyst, Financial Risk Manager.

(D) Housing Market Analysis Research

- A graduate or post-graduate university degree, preferably in the social sciences, economics and related fields;
- Knowledge of social science theories, analytical approaches, and empirical research methods; and,
- Ability to use computer systems and relevant data management and analytical software, including SPSS, SAS, EVIEW, or other statistical software;

In addition to the above requirements, the specific personnel require the following experience:

Project Leader:

- A minimum of five (5) years hands-on experience in managing relevant projects;
- Experience managing at least five (5) projects/assignments related to the research area(s).

Senior Researcher:

- At least five (5) years experience relevant to the research area(s);
- Experience on at least five (5) projects/assignments related to the research area(s).

Researcher:

- At least three (3) years experience relevant to the research area(s);
- Experience working on at least three (3) projects/assignments related to the research area(s).

4 SECTION 4 OFFER REQUIREMENTS

4.1 Overview of Section 4

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

Response #	
4.2	Covering Letter
4.3	Offeror's Qualifications
4.4	Response to Statement of Goods and/or Services
4.4.1	Writing Samples
4.5	Project Management Plan
4.6	Pricing

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

Requirements for each Response Item are detailed below.

4.2 Covering Letter

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

- (a) The primary contact person with respect to this RFSO: the individual's name, address, contact numbers by phone and fax, and contact e-mail address.
- (b) Clearly indicate which stream (Evaluation Services or Research Services) the Offeror is applying to, and if the Offeror is applying to the Research stream, indicate the specific area(s) (Socio-Economic, Technical, Housing Finance, Housing Market Analysis) to which the Offeror is applying and highlight the specific knowledge areas the Offeror brings to that respective area.

4.3 Offeror's Qualifications Mandatory

Offeror's offer MUST include information about the Offeror's qualifications as follows:

- (a) A description of the firm and service delivery specialization.
- (b) Résumés for all project personnel who would be assigned to the CMHC account with clear indication as to which Stream and/or research area(s) the personnel would be assigned.
- (c) Relevant Project List: Examples of a minimum of three (3) relevant contracts. Projects should be drawn from work completed within the past five years. If the Offeror is applying to more than research area (Socio-Economic, Technical, Housing Finance, Housing Market Analysis), three examples per area of work must be supplied. For each project example, the following information is required: brief description of the project and

work performed, the personnel who completed the work and their role(s), the company name and address for which the work was done (unless there is a proprietary reason not to disclose); contact person name and phone number of the company for which the work was done (unless there is a proprietary reason not to disclose). CMHC may approach any such contact person for information relating to the quality of services provided by the Offeror.

4.4 Response to Statement of Goods and/or Services Mandatory

In this section, the Offeror **MUST** provide detailed information relative to the specifications listed in Section 3, The Statement of Goods and/or Services to be covered under this Standing Offer (SO). If the Offeror is applying to more than one stream (Evaluation Services or Research Services) this must be clearly described and addressed so that each Stream and/or research area can be evaluated separately. For applicants to the Research Services stream, the applicant shall indicate clearly the specific research area(s) they are applying to. As well, Offerors in the Research Services stream must clearly indicate what their specialized knowledge areas are within each of the research areas to which they are applying. Offerors do not need to demonstrate all areas of specialized knowledge within a specific Research Area.

4.4.1 Writing samples Mandatory

The Offeror must provide examples of written products in a variety of formats (links or documents) such as reports, briefings, web content or other formats. Three (3) writing samples must be provided for each respective Stream and/or research area, if applying to more than one. Each writing sample should be no more than five (5) pages in length and must demonstrate the ability to present information and results in a clear, concise manner using plain language, as well as the ability to synthesize complex information (e.g. data) concisely.

4.5 Project Management Plan Mandatory

Project Management Approach: The Offeror shall describe its project management approach and the project management organizational structure including reporting levels and lines of authority. Offerors must also provide a typical work-team time allocation breakdown by functional level for a sample 50 person-hour project.

Quality Control: The Offeror shall describe its approach to quality control including: details of the methods used in ensuring quality of the goods and/or services, and response mechanisms in the case of errors, omissions, delays, etc.

Status Reporting to CMHC: The Offeror shall describe its status reporting methodology including details of written and oral progress reporting methods.

Interface with CMHC: The Offeror shall describe and explain its interface points with CMHC, all interface mechanisms, and how interface issues and difficulties will be resolved.

4.6 Pricing Mandatory

The Offeror must include per diem rates and hourly rates for the functions described in the Statement of Goods and Services as per the table below. Should travel be required in the delivery

of services under this Standing Offer, vendors will be reimbursed for actual costs in accordance with the CMHC travel policy.

Role	Per Diem Rate (\$)	Hourly Rate (\$)
Project Manager/Team Leader: (large projects only)		
Senior Evaluator/Researcher		
Evaluator/Researcher		

SECTION 5 EVALUATION AND SELECTION

5.1 Overview of Section 5

Section 5 describes the process CMHC will use to evaluate offers and qualify Standing Offer Holders. All Offerors that meet all of the mandatory criteria and meet or surpass any stated upset scores will be awarded a Standing Offer. Receipt of a Standing Offer does NOT automatically mean that an Offeror will receive subsequent Call-ups.

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

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

5.2 Limitation of Damages

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

5.3 Evaluation Table

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

5.4 Evaluation Methodology

Each offer will be examined to determine substantial compliance with each mandatory requirement identified in this RFSO. An offer must substantially comply with all of the mandatory requirements in order to proceed in the evaluation process. An offer which is deemed by CMHC to be non-compliant in one or more mandatory requirements will be eliminated from further consideration. An offer which meets all the mandatory requirements will be deemed substantially compliant and will proceed in the evaluation process. Please note where an Offeror is applying to more than one Stream and/or research area, each stream and research area will be evaluated as separate "offers" for each respective stream or area.

Each substantially compliant offer shall be evaluated by an Evaluation Committee made up of qualified personnel. There will be an Evaluation Committee for each of the streams and research areas. Each Committee member shall evaluate and numerically score each offer in accordance with the evaluation criteria as shown in the Evaluation Table, Appendix "C". An Offeror applying to more than one Stream or research area will be scored independently for each stream or research area.

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

Each compliant offer that meets the minimum upset scores in each category shall then be evaluated on their pricing proposal. The pricing score will be determined by prorating each proposal based on the lowest cost receiving the highest number of points. The points awarded for pricing will be added to the overall score for the proponent.

Each compliant offer that meets the minimum upset scores in each category shall then be awarded a Standing Offer (SO). If a pre-determined number of Standing Offers (SO) are to be awarded, the Offeror with the highest score will be named the first Offeror, the second highest score will be named the second Offeror and so on. These Offerors shall make up the short-list of offerors granted Standing Offers.

5.5 Offeror Selection

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

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

Announcement of the successful Offerors will be made to all Offerors following the notification of the Standing Offer Offerors. All successful Offerors will be required to agree to and sign the terms and conditions attached in Appendix A of the RFSO and attach their pricing proposal.

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

6.1 Standing Offer

Terms and Conditions for Call-ups resulting from this standing offer are attached in Appendix A of this RFSO and will be a part of any Call-ups raised against this SO.

6.2 Mandatory Terms and Conditions

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

SECTION 7: APPENDICES

Appendix A: Standing Offer and Any Resulting Call-up Terms and Conditions

1. Article 1.0 - The Services

- 1.1. The Standing Offer Holder covenants and agrees to provide Evaluation Services (Stream 1) and/or Housing Research Services (Socio-Economic, Technical, Finance and Market Analysis) (Stream 2), on an 'as and when needed' basis. CMHC will issue a written call up to the Standing Offer Holder when CMHC requires the Standing Offer Holder's Services. Each call up issued shall be subject to the terms and conditions of the Standing Offer. Upon the issue of a call up, the Standing Offer Holder shall provide the services as detailed in the Call-up and in accordance with the Statement of Goods and/or Services.
- 1.2. The Standing Offer Holder acknowledges that the Standing Offer does not guarantee that CMHC will issue a Call-up to the Standing Offer Holder and that call ups will be issued at the sole discretion of CMHC.

2. Article 2.0 - Term of the Standing Offer

- 2.1. The term of the Standing Offer Agreement shall be for a period of two (2) years commencing on November 30, 2015 and ending on November 29, 2017, with the possibility of extension for one (1) additional year.

2.2. Termination

CMHC may terminate a Call-up against a Standing Offer for any reason with no penalty by giving ten (10) days written notice, at any time during the Term.

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

1. The Standing Offer Holder commits a material breach of its duties under the Call-up against a Standing Offer, unless, in the case of such breach, the Standing Offer Holder, within ten (10) calendar days after receipt of written notice of such breach from CMHC, in a manner satisfactory to CMHC in its sole, absolute and non-reviewable discretion, (a) cures such breach or takes reasonable steps to cure such breach and (b) indemnifies CMHC for any resulting damage or loss;
2. The Standing Offer Holder commits numerous breaches of its duties under this Standing offer that collectively constitute a material breach;

3. A change in control of the Standing Offer Holder where such control is acquired, directly or indirectly, in a single transaction or series of related transactions, or all or substantially all of the assets of the Standing Offer Holder are acquired, by any entity, or the Standing Offer Holder is merged with or into another entity to form a new entity, unless the Standing Offer Holder demonstrates to the satisfaction of CMHC that such event will not adversely affect its ability to perform the services under this Standing offer;
4. The Standing Offer Holder commits fraud or gross misconduct; or
5. The Standing Offer Holder becomes bankrupt or insolvent, or a receiving order is made against the Standing Offer Holder, or any assignment is made for the benefit of the creditors, or if an order is made or a resolution passed for the winding up of the Standing Offer Holder, or if the Standing Offer Holder takes the benefit of any Statute for the time in force relating to bankrupt or insolvent debtors.

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

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

3. Article 3 Financial

3.1. Fixed Pricing

In consideration of the provision of the Goods and/or Services, as described above in Article 1.0 “The Service”, CMHC agrees to pay the Standing Offer Holder an amount based on rates provided in response to Section 4.7 of this RFSO and attached as Appendix “A”.

3.2. Taxes to be collected by Standing Offer Holder

Standing Offer Holder GST/HST or RST, to the extent applicable and required to be collected by the Standing Offer Holder and specifically agreed between the Standing Offer Holder and CMHC, shall be collected by the Standing Offer Holder on the consideration due and shown as a separate item on an invoice. Where the Standing Offer Holder is required to collect the

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

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

3.3. Invoicing

The Standing Offer Holder shall submit detailed invoices for work completed under a Call-up to CMHC during the Term. The Standing Offer Holder must allow 30 days from delivery of invoice for payment without interest charges. The Standing Offer Holder cannot invoice prior to performance of the service under a Call-up. All invoices, notices and requests for payment must make reference to this Standing Offer by quoting CMHC file number [201503386](#) and be forwarded to the CMHC representative designated in the Standing Offer.

3.4. Audit

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

Any audit will be subject to generally accepted accounting principles.

The Standing Offer Holder agrees to provide the Corporation's internal or external auditors with sufficient original documents in order to conduct any audit procedures. Any audit may be conducted without prior notice, however the Corporation agrees to cooperate with the Standing Offer Holder in the course of conducting any audit in order to avoid disruption in day-to-day operations.

4. Article 4: General Terms and Conditions

4.1. Assignment of the Standing Offer

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

4.2. Standing Offer Holder's Indemnification

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

4.3. No Limitation

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

4.4. Non-Compliance or Default by Standing Offer Holder

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

4.5. Force Majeure

In the event that the Standing Offer Holder is prevented from fulfilling its obligations under the terms of a Call-up raised against this Standing Offer by a force majeure or act of Nature (an event or effect that cannot be reasonably anticipated or controlled), the Standing Offer Holder shall notify CMHC in writing, within the shortest period of time. The said written notice shall be sent by registered mail and shall state the factors that constitute a force

majeure or an act of Nature. Without limiting the application of the above, the following shall constitute cases of force majeure: war, serious public disturbances, all impediments arising from orders or prohibitions of public authority, acts of Nature, actions of public enemies, strikes, lockout and other labour disputes, riots, flooding, hurricane, fire, explosion or any other natural disasters over which the Standing Offer Holder has no reasonable control.

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

4.6. Compliance With Laws

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

4.7. Laws Governing Standing Offer

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

4.8. Independent Standing Offer Holder

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

4.9. Standing Offer Holder's Authority

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

4.10. Corporation Identification

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

4.11. Moral Rights

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

4.12. Intellectual Property Rights

All information and materials produced under any Call-up resulting from this Standing Offer shall be the exclusive property of the Standing Offer Holder and the Standing Offer Holder shall have copyright therein. Without restricting the scope of any license or other right that CMHC may otherwise hold, the Standing Offer Holder hereby grants to CMHC an exclusive, perpetual, irrevocable, fully-paid and royalty-free right and license to use all or part of the information and materials produced under any Call-ups resulting from this SO world-wide, with the right to modify the information or materials for any purpose related to the current or future operations of CMHC. The license so granted shall survive the termination of the SO.

4.13. Non-Disclosure of CMHC Information

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

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

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

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

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

4.14. House of Commons

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

4.15. Scope of Standing Offer

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

4.16. Income Tax Reporting Requirement

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

4.17. Conflict of Interest

(a) The Standing Offer Holder and its principals, employees and agents shall avoid any conflict of interest during the term of this SO and any Call-up raised against this SO and shall immediately declare any existing, potential or apparent conflict and shall, upon direction of CMHC, take steps to eliminate any conflict or perception that a conflict of interest exists.

(b) The Standing Offer Holder must not provide any services to any third party in circumstances that might reasonably give rise to a conflict of interest, including a conflict between the Standing Offer Holder's duties to that third party and the Standing Offer Holder's duties to CMHC.

(c) In the event that a conflict of interest, real or perceived, cannot be resolved to the satisfaction of CMHC, CMHC shall have the right to immediately terminate the SO and any Call-up against this SO. All portions of the Work which have been completed at the date of termination shall be forwarded to CMHC and CMHC shall be liable for payment to the Standing Offer Holder of an amount which, in the sole opinion of CMHC, constitutes reasonable payment for the partial performance of the Standing Offer Holder's obligations under the Call-up. Upon such payment, CMHC shall have no further obligation of any nature or kind to the Standing Offer Holder.

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

4.18. Approval of Services

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

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

(a) direct Standing Offer Holder to redo the work or part of the section which was not completed to CMHC's satisfaction;

(b) withhold payment due or accrued due to the Standing Offer Holder for services rendered pursuant to the Call-up under this Standing Offer

(c) set off any expenses incurred by CMHC in remedying the default or failures of Standing Offer Holder against payment for payment due or accrued due to the Standing Offer Holder with regards to any Call-up;

(d) terminate this Standing Offer or any Call-up against this SO for default and /or seek indemnification from the Standing Offer Holder for losses suffered by CMHC as a result of such default.

4.19. Ownership

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

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

4.20. Suspension of Services and Changes in Specifications

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

4.21. Insurance

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

- cross liability including severability of interest clause
- blanket contractual liability
- personal injury
- Canada Mortgage and Housing Corporation to be added as additional insured.
- 30 days prior written notice of cancellation to Risk Management Consultant, 700 Montreal Road, Ottawa, Ontario, K1A 0P7.

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

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

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

4.22. Final Report

(a) Where a final report is to be prepared, it shall be in a form acceptable to CMHC, according to the requirements of the specific project for which the Offeror is being called-up and suitable for reproduction or publication.

(b) CMHC

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

4.23. Final Standing Offer Form

It is understood and agreed that the terms and conditions set out in this Appendix A of the RFSO “Standing Offer and Any Resulting Call-up Terms and Conditions” will, at CMHC's discretion, form part of any resultant Standing Offer and accordingly may be incorporated into and form part of any and all authorized Call-up(s) against a Standing Offer.

5. Article 5.0 - Standing Offer Administration

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

Appendix B: Certification of Submission Mandatory

_____ hereby:
Company Name Procurement Business Number (PBN)

1. offers to provide services and/or goods to CMHC, as described in this Offer, on an if, as and when required basis, all in accordance with the Request for Standing Offers;
2. offers the terms as set out in this Offer, including any financial quotations, for a period of days indicated in Section 2.7 following the closing date;
3. certifies that, at the time of submitting this offer, is in full compliance with all tax statutes administered by all provincial, territorial and federal Ministries of Finance and that, in particular, all returns required to be filed under all provincial and federal tax statutes have been filed, and all taxes due and payable under those statutes have been paid or satisfactory arrangements for their payment have been made and maintained;
4. represents and warrants that in submitting the Offer or performing the Call-Up under the Standing Offer, there is no actual or perceived conflict of interest; or identifies the following conflict of interest:
5. represents and warrants that in preparing the Offer, there was no actual or perceived unfair advantage due to the receipt of information regarding the RFSO that was not made available to other Offerors;
6. certifies that this Offer was independently arrived at, without collusion;
7. certifies that no gratuities or gifts in kind were offered to any CMHC employee, Board member or Governor-in-Council appointee; and intended, by the gratuity, to obtain a Call-Up under the Standing Offer or favourable treatment under a Call-Up from a Standing Offer;
8. authorizes CMHC to conduct such investigation as it deems appropriate to verify the contents of the Offer;
9. certifies, unless explicitly outlined in the Offer, that all pricing information is based on service provision which, at a minimum, fully meets all of the existing service standards as outlined in the Statement of Goods and/or Services;
10. agrees to comply with all of the terms and conditions outlined in the Standing Offer in an unaltered form for any subsequent Call-up.
11. agrees that, in the event of acceptance of this Offer, it will enter into a Standing Offer in accordance with the RFSO, and, upon entry into a Call-Up under a Standing Offer with CMHC, it will commit to providing the full scope of services identified in the Call-up and in accordance with the Standing Offer.
12. agrees that, all the materials produced under the terms of this RFSO shall be the exclusive property of CMHC, that CMHC shall have copyright therein; and will not reimburse the Offeror for costs associated with the work, travel or documents produced in response to this RFSO;
13. agrees that it and any other persons for which it is responsible, who are to perform the work as stated in this RFSO, at the request of CMHC will comply with security screening as deemed appropriate;
14. authorizes CMHC to perform a credit check and/or financial evaluation, as required.

Signed this _____ day of _____, 2015 at _____, Canada.

Corporations are not required to provide a corporate seal.

Corporation/Individual:

Signature of Signing Authority Name & Title of Signing Authority

Declaration: I have the authority to bind the company.

Appendix C: Evaluation Table

Please note that Offerors applying to more than one Stream (Evaluation or Research) or research area (Socio- Economic, Technical, Housing Finance, Housing Market Analysis) will be evaluated for each Stream/research area separately.

EVALUATION CRITERIA	A	B	C	D
	WEIGHT 100 Total	POINTS 1 to 5	UPSET SCORE	SCORE AxB
1. Offeror Qualifications (Section 4.3) a) Description of Offeror appropriately describes firm and service delivery specialization(s). b) Proponent team possesses appropriate qualifications (including certifications and accreditations) and experience, roles of team members, relevance to the area(s) for work, as described in Section 3 of the RFSO, and appropriate certifications and . c) List of projects are relevant to the services required by CMHC in scale, scope, and subject matter.	35		105	
2. Response to Statement of Goods and Services (Section 4.4) a) Demonstrates knowledge of subject matter (specific to the requirements described Section 3 of RFSO and the area(s) of research). b) Demonstrates knowledge of appropriate methodologies, technologies and approaches. c)	35		105	
3. Writing Samples (Section 4.41) a) Demonstrates ability to present information clearly, concisely, and in plain language; b) Demonstrates ability to appropriately illustrate information and results; c) Demonstrates ability to concisely synthesize complex information.	5		15	

EVALUATION CRITERIA	A	B	C	D
	WEIGHT 100 Total	POINTS 1 to 5	UPSET SCORE	SCORE AxB
Project Management Approach (Section 4.5) a) Provides description of the project management approach, including an appropriate work-team time allocation breakdown. b) Appropriately illustrates the project management organizational structure, including reporting levels and lines of authority for team members; c) Demonstrates quality control approach, including methods to ensure quality, response mechanisms in the case of errors, omissions, delays, etc. d) Proposes an appropriate method for tracking status; e) Proposes an appropriate strategy for communications with CMHC, including conflict resolution.	15		45	
Pricing (Section 4.6) a) Prorated based on the lowest cost receiving the highest number of points.	10		30	
TOTALS	100			

Appendix D: Mandatory Compliance Checklist

- Delivery Instructions and Deadline Section 2.3
- Offering Period Section 2.7
- Offeror's Qualifications Section 4.3
- Response to Statement of Goods and/or Services Section 4.4
- Writing Samples Section 4.4.1
- Pricing Section 4.6
- Certificate of Submission Appendix B