

# REQUEST FOR PROPOSAL

FOR

## 2016 Secondary Rental Market Survey

*Date issued: June 29, 2016*

*Solicitation Closes: July 15, 2016*

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201602167*

*Originating Department: CMHC*

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## **I SECTION I GENERAL INFORMATION**

### **I.1 Overview of Section I**

*The purpose of this section is to provide general information about Canada Mortgage and Housing Corporation (CMHC) and this Request for Proposal (RFP). All capitalized terms in this document have the meaning ascribed to them within the RFP document, the draft agreement, or in certain cases, are terms that are in commonly usage at CMHC.*

### **I.2 Introduction and Scope**

*The Canada Mortgage and Housing Corporation (CMHC) wishes to enter into a contract with a vendor(s) (hereafter referred to as the “proponent(s)”) for the purpose of conducting a telephone survey to collect information on the secondary rental market, using the Household Rent Survey (HRS)*

*The work required under this contract will be completed during August to October 2016. The value of this contract is expected to range between \$450,000 and \$600,000 CDN per yearly survey period including all applicable taxes. If this contract is completed to the satisfaction of CMHC, CMHC retains the right to contract directly with the contractor for future yearly survey periods in 2017, 2018, 2019 and 2020 not to exceed five (5) yearly survey periods including the initial term.*

*Canada Mortgage and Housing Corporation shall not be obligated in any manner to any proponent whatsoever until a written Agreement has been duly executed relating to a qualified, approved proposal.*

*More detailed specifications can be found in Section 3, “Statement of Work”.*

*By issuing this RFP and accepting proposals, CMHC assumes the obligation of conducting the process in a fair and transparent manner. CMHC has no obligation to procure any services, or to compensate any proponent for work done other than as may be set out in a written contract with that proponent.*

### **I.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 Families, Children and Social, and Minister responsible for Canada Mortgage and Housing Corporation, the Honorable Jean-Yves Duclos.*

*CMHC has approximately 2,000 employees located at its National Office in Ottawa, and at five Business Centres throughout Canada: Atlantic; Quebec; Ontario; British Columbia; and Prairies & Territories.*

#### **1.4 Purpose of Request for Proposal**

CMHC uses an RFP to describe its requirements, ask suppliers for their proposed solutions, describe the criteria which will be used in evaluating proposals and selecting a lead proponent, and outline the terms and conditions under which the successful proponent will operate or supply goods and/or services. By submitting a proposal, proponents agree to be bound by the terms of this RFP, and the terms of the proposal that they submit.

In this RFP process, proposals and proponents are evaluated in terms of ability to satisfy the stated requirements, while providing best value to CMHC with respect to its requirements.

#### **1.5 Service Providers Database**

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 a proposal. The Procurement Business Number (PBN) provided by this registration must be included with your proposal. 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.

#### **1.6 Schedule of Events**

The following schedule summarizes significant target dates for the RFP process. These dates are objectives only, and they may be changed by CMHC at its sole discretion. They shall not be considered terms or conditions under which the RFP will be conducted.

Date	Activities
June 29, 2016	Request for Proposal issued
July 8, 2016	Submission of Questions Deadline
July 15, 2016	Submission Deadline
July 2016	Evaluation and Selection of lead proponent
July 2016	Agreement award and finalization with lead proponent
July 2016	Announcement of successful proponent
July 2016	As requested, debriefing to unsuccessful proponents

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## **1.7 Mandatory Requirements**

*Throughout this RFP, certain requirements are identified as mandatory. Compliance with mandatory requirements will be assessed by CMHC in its sole discretion.*

*A mandatory requirement is defined as:*

- *a minimum standard that a proposal must meet in order to be considered for further evaluation;*
- *a requirement that must be met in order for the proponent to substantially comply with the requirements of the RFP; and*
- *a term that must be included in any Agreement that results from the RFP*

*Mandatory requirements are identified in:*

- *Section 2 Submission Instructions*
- *Section 4 Proposal Requirements*
- *Section 6 Proposed Agreement, and*
- *Appendix A The Certificate of Submission.*

**Caution:** *Proposals which fail, in the reasonable discretion of CMHC, to meet any mandatory requirement will be eliminated from further consideration in the evaluation process. Notwithstanding the foregoing, CMHC reserves the right to waive or revise any mandatory requirements during the RFP process if a waiver or revision is necessary to meet the CMHC's intent in issuing the RFP, or to ensure that CMHC receives best value from the process. In the event that CMHC elects to waive a mandatory requirement, all proponents will be advised of the change in requirements and provided with an opportunity to revise their proposals as noted in section 2.4.*

## **1.8 Procurement Policy Re: The Environment**

*CMHC fully supports the principle of sustainable development. Economic development and the preservation of the environment are each given consideration in the RFP process to help ensure that the actions of one generation do not compromise the ability of future generations to have an equal quality of life. To this end, CMHC is dedicated to integrating sound environmental practices into its procurement practices.*

*The Contracting Authority may authorize preferential pricing of up to ten percent for the purchase of more environmentally sound commodities. The evaluation methodology in Section 5 describes any environmental preferences associated with this procurement.*

## **I.9 Proponent Feedback**

*CMHC aims to continuously improve its bid documents and procedures. CMHC welcomes input regarding proponent experience in responding to its RFPs, whether it be positive or negative. As CMHC does not wish to be perceived as influenced by such feedback in the award decision, proponents are requested to submit their feedback after an Agreement has been executed or the RFP process has been terminated.*

*Proponents wishing to provide feedback may submit comments labeled as **Proponent Feedback RFP # 201602167** to the name and address provided in Section 2.4.*

*Any proponent who notes a material flaw in the RFP that could prevent the process from being conducted in a fair and objective manner, or that could prevent CMHC from receiving best value from the process, is asked to report the flaw to CMHC as soon as possible, using the inquiry process specified in Section 2.4*

## **I.10 Direct Deposit and Income Tax Reporting Requirement**

*All payments and transfers of funds under any resulting contract will be made by means of EFT direct deposit, unless an exception is requested in the proposal and is approved prior to execution of a contract.*

*As a federal Crown Corporation, CMHC is obliged under the Income Tax Act and its associated regulations to report payments to suppliers of goods and/or services by using a T1204 supplementary slip. Proponents are therefore required to provide the necessary information, including the proponent's social insurance number and/or corporate identification number, with their proposals in order to allow CMHC to complete the T1204 supplementary slip. The lead proponent will be required to complete and sign a Supplier - Direct Deposit and Tax Information Form (CMHC/SCHL 3085) prior to the commencement of the term of any resulting agreement. Throughout the term, the Contractor will be required to ensure that the information provided remains accurate and up to date. The Contractor assumes full responsibility for and indemnifies CMHC from and against any errors in payments or tax reporting that arise because the information supplied is inaccurate or out of date.*

## **2 SECTION 2 SUBMISSION INSTRUCTIONS**

### **2.1 Overview of Section 2**

*The purpose of Section 2 is to inform the proponent about CMHC's procedures and rules pertaining to this RFP process.*

*Proponents are advised that CMHC has provided a Mandatory Compliance Checklist as Appendix C to the RFP. The Checklist is provided for the benefit of proponents prior to submission of their proposals, to help them ensure that they have complied with all mandatory requirements. Non-compliance with a mandatory requirement will result in the proposal being eliminated from further consideration.*

### **2.2 Certificate of Submission**

### **MANDATORY**

*The Certificate of Submission, attached as Appendix A, summarizes some of the mandatory requirements set out in the RFP. As noted in Section 1.7, it is also a mandatory requirement that a proposal include a Certificate of Submission (or an accurate reproduction) signed by the proponent.*

*Should a proponent not include the signed Certificate of Submission with its proposal, the proponent will be notified by CMHC and will have 48 hours from the time of notification to meet this requirement.*

### **2.3 Delivery Instructions and Deadline**

*Timely and correct delivery of proposals to the exact specified proposal delivery address is the sole responsibility of the proponent. All risks and consequences of a failure to deliver a proposal to CMHC are borne by the proponent. CMHC will not assume those risks or responsibilities under any circumstances.*

*The time of delivery for the purposes of this section is deemed to be the time recorded by the CMHC system receiving the proposal, and not the time the proposal was sent by the proponent.*

**Please be advised that EBID has a size limitation 10 MB. It is advisable and recommended that Proponents submit larger proposals in multiple smaller files.**

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

**Please be advised that electronic transmissions may not necessarily be immediate and can experience lengthy delivery delays. Proponents should ensure that sufficient delivery time is allowed, as they assume the risk of delays in transmission and receipt.**

### **Address for Delivery**



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

**EBID@cmhc-schl.gc.ca**

The subject line of the transmission must state: RFP, file # 201602167

## **Format**

Proposals may be submitted in MS Word or Adobe Acrobat PDF.

Rich Text formatted or Compressed (Zipped) documents cannot be opened by CMHC and will not be considered.

## **Proposal Opening and Verification Period**

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

### **2.3.1 Submission Deadline**

### **MANDATORY**

Your proposal must be **received** at the exact location as specified above, on or before the submission deadline set as:

**2:00 p.m. local Ottawa time, on July 15, 2016**

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

### **2.3.2 Inquiries**

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

Heather J Forsyth, Procurement Advisor

Fax: (613) 740-2554

Email: [hforseyth@cmhc-schl.gc.ca](mailto:hforseyth@cmhc-schl.gc.ca)

Changes to this RFP document will only be effective if issued by CMHC in writing as described below. Proponents are therefore strongly cautioned to request that all clarification, direction and changes be provided in writing, as information given orally by any person within CMHC shall not be binding upon CMHC.

All written questions submitted, which in the opinion of CMHC raise an issue that has the potential to affect all proponents, will be answered by CMHC in writing and distributed to all proponents by facsimile, e-mail or GETS. The identity of the proponent making the inquiry will not be included in the response. Any questions of a proprietary nature must be clearly marked as such.

*In the event that it becomes necessary to revise any part of the RFP as a result of any inquiry or for any other reason, an addendum to this RFP will be provided to proponents by facsimile, e-mail or GETS.*

*CMHC has no obligation to respond to any inquiry, and will determine, at its sole discretion, whether it will respond to inquiries that are submitted. CMHC cannot guarantee a reply to inquiries received less than **seven calendar days** prior to the closing date.*

## **2.4 Communication**

*During proposal evaluations, CMHC reserves the right to contact or meet with any individual proponent in order to obtain clarification of its submission, including clarification of the scope of services offered. Any such communication is limited to clarification purposes only, and proponents will not be allowed to revise their proposal during this process.*

## **2.5 Proponent Contact**

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

## **2.6 Offering Period**

### **MANDATORY**

*It is a deemed condition of every proposal that the terms of the proposal, including all terms relating to pricing, shall remain valid and binding on the proponent until such time as an Agreement is negotiated and executed, not to exceed sixty (60) days following the closing date.*

## **2.7 Changes to Proposals**

*Changes to a proposal are permitted, provided that they are received as an addendum to, or clarification of, a previously submitted proposal, or as a new proposal that replaces and supersedes the proposal that was previously submitted.*

*Any addendum, clarification, or new proposal must be submitted as per the delivery instructions outlined in Section 2.3, be clearly marked “**REVISION**”, and be received no later than the submission deadline. Where the new proposal is intended to replace all or part of an earlier proposal, it must be accompanied by a clear statement specifying the sections of the earlier proposal that are replaced by the new proposal.*

## **2.8 Multiple Proposals**

*Proponents interested in submitting more than one proposal for consideration may do so, provided that each proposal independently complies with the instructions, terms and conditions of this RFP.*

## **2.9 Acceptable Alternative**

*An alternative to any portion of a proposal may be submitted as an addendum to a proposal.*

*Where the alternative proposal relates to a mandatory requirement, the alternative must meet that requirement.*

## **2.10 No Liability**

*While CMHC has made considerable efforts to ensure that the information in this RFP is accurate and complete, it is possible that errors may exist. The information is not guaranteed or warranted to be accurate by CMHC, nor is it necessarily comprehensive or exhaustive. CMHC will have no liability of any kind to proponents for losses or damages arising from any errors that may be found in the RFP, regardless of how the errors are caused. Proponents remain obliged to make their own investigation of relevant information and to form their own opinions and conclusions in respect of the matters addressed in this RFP.*

*By submitting a proposal, proponents waive any claim or cause of action that they may have against CMHC or its representatives as a result of the conduct of this RFP process or any resulting contract award, except insofar as they have proof of wilful misconduct on the part of CMHC or its representatives. Proponents agree that they will not bring a court action or institute any other proceedings against CMHC for damages arising from the conduct of this RFP or any resulting contract award. This section is intended to be a complete waiver of the proponent's right to claim damages subject to the limited exception noted above.*

## **2.11 Verification of Proposals**

*The proponent authorizes CMHC to conduct such investigation as it deems appropriate to verify the contents of the proponent's proposal.*

## **2.12 Ownership of Responses**

*All proposals and related materials become the property of CMHC upon submission and CMHC shall have all intellectual property rights in those proposals and materials. Proposals and related materials will not be returned to proponents. Proponents are not entitled to any compensation for any work related to, or materials supplied in the preparation of their proposals.*

*The proponent warrants that the proponent possesses all rights necessary to satisfy this requirement. The proponent hereby certifies that it has waived, or has obtained a waiver in favour of CMHC of, all moral rights in the proposal and related materials, and hereby assigns all rights in the material, as*

provided for in the law of copyright. The proponent agrees to execute any document requested by CMHC acknowledging CMHC's ownership of the material and the waiver of moral rights therein.

All information regarding the terms and conditions, financial and/or technical aspects of the proponent's proposal which are of a proprietary or confidential nature, must be clearly marked "**PROPRIETARY**" or "**CONFIDENTIAL**". Proprietary and confidential markings shall be included beside **each item or at the top of each page containing information that the proponent wishes to protect from disclosure.**

CMHC will take steps to protect proponents' documents and information so marked from disclosure. Notwithstanding the foregoing, CMHC shall have no liability of any kind to proponents based on the inadvertent or unintentional disclosure of proprietary information.

Proponents are further advised that as a Crown corporation, CMHC is subject to the federal legislation with respect to access to information and privacy. In certain specific circumstances, information submitted to CMHC by third parties may be required to be disclosed pursuant to federal legislation. In such cases, to the extent reasonably possible, CMHC will make efforts to advise the proponent of the required disclosure prior to releasing the information.

### **2.13 Proprietary Information**

Information about CMHC that is contained in this RFP document is to be considered proprietary information of CMHC. It is made available for the sole purpose of providing proponents with sufficient information to prepare responses to the RFP. Proponents and other readers of this document may not make any other use of information contained in the RFP.

### **2.14 Corporation Identification**

Proponents agree that they will not make any use whatsoever of CMHC's name, logo or other official marks without the express written consent of CMHC.

### **2.15 Declaration with respect to Gratuities**

By submitting a proposal, the proponent certifies that no representative of the proponent, or any individual or entity associated with the proponent has offered or given a gratuity (e.g. an entertainment or gift) or other benefit to any CMHC employee, Board member or Governor-in-Council appointee with the intention of obtaining favourable treatment from CMHC.

### **2.16 Conflict of Interest**

The proponent and its principals, employees and agents shall avoid any real, potential or apparent conflict of interest during the RFP process, and upon becoming aware of a real, potential or apparent conflict, shall immediately declare the conflict to CMHC. The proponent shall then, upon direction of CMHC, take steps to eliminate the conflict, potential conflict or perception that a conflict of interest exists.

The successful proponent must not provide any services to any third party in circumstances that might reasonably give rise to a conflict of interest between the proponent's duties to that third party and the proponent's duties to CMHC.

In the event that a conflict of interest, real, potential or perceived, cannot be resolved to the satisfaction of CMHC, CMHC shall have the right to immediately eliminate the proponent from consideration under the RFP or to terminate the resulting agreement. Upon such elimination or termination, CMHC shall have no obligation of any nature or kind to the proponent.

## **2.17 Declaration with respect to Bid Rigging and Collusion**

By submitting its proposal, the proponent certifies that:

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

## **2.18 Security Clearance**

CMHC requires employees of the selected proponent to be security cleared in order to permit them access to CMHC premises when and if required. This process normally takes approximately five working days, but may take longer, depending on the circumstances.

If they are not security cleared, the proponent or its employees will require an escort by a CMHC employee if required to access CMHC premises and will not be granted access to CMHC information and systems or any confidential information. Where the required security clearance is not granted to an individual, CMHC will have the right to exclude that individual from performing the services outlined in this RFP. The failure of an individual to obtain security clearance shall not relieve the successful proponent from any of its obligations under this RFP and any resulting agreement.

## **2.19 Joint Venture Responses**

Joint venture proposals should adequately represent and communicate the proposed roles and responsibilities of each party participating in the joint venture, and must provide a detailed description of the proposed joint venture business arrangement. The description must, at a minimum, list the companies involved, indicate how long the business arrangement has been (or will be) in existence, outline the goods or service(s) that each respective party would be providing and describe the proposed roles and responsibilities of each party.

The proponent shall designate one of the entities participating in the joint venture as the contact person for the purpose of this RFP process. All communications between the proponent and CMHC will be directed through the contact person.

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

## **2.20 Intellectual Property Rights**

*All material, reports and other work product produced under this (RFP and the resulting) Agreement will be the sole property of CMHC. The Contractor warrants that the Contractor is the only person who has or will have moral rights in the material created by the Contractor and supplied under this Agreement and the Contractor hereby waives in favour of CMHC all of the Contractor's moral rights in the material, as provided for in the law of copyright. Upon the material coming into existence, the Contractor agrees to execute any document requested by CMHC acknowledging CMHC's ownership of the material and work product and the waiver of the Contractor's moral rights therein.*

## **2.21 Non-Disclosure of CMHC Information**

*Under this section, "CMHC Information" refers to any and all information of a confidential nature, including all personal information, which is managed, accessed, collected, used, disclosed, retained, received, created or disposed of by CMHC in order to complete this RFP process and to fulfill the requirements of any resulting agreement. Without limiting the generality of the foregoing, CMHC Information includes information held in any format and information provided directly, indirectly to the proponent.*

*The proponent understands and agrees to treat all CMHC Information as proprietary, confidential and sensitive, unless otherwise specifically agreed to in writing by CMHC. The proponent agrees to restrict access to CMHC Information to those persons who have a need to know this information in order to prepare the proponent's response to this RFP, or perform the work or services under any resulting agreement.*

*The proponent further 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 proponent shall ensure that CMHC Information remains in Canada and expressly agrees to segregate CMHC Information (whether in electronic format or in hard copy) from any other information by electronic or physical means. Without limiting the generality of the foregoing, the proponent shall not and shall ensure that any subcontractor, reseller, agent or any other person engaged to perform any part of the work or services does not release, share or otherwise divulge CMHC Information to any other person including subsidiaries, branch offices, partners or subcontractors of the proponent without the prior written consent of CMHC.*

## **3 SECTION 3 STATEMENT OF WORK**

### **3.1 Overview of Section 3**

*This section of the RFP is intended to provide the proponent with the information necessary to develop a responsive proposal. The Statement of Work is a complete description of the tasks to be done, results to be achieved and/or the goods to be supplied.*

### **3.2 Mandatory Requirements**

*A mandatory requirement is a minimum standard that a proposal must meet in order to be considered for further evaluation.*

*Any mandatory requirements associated with the Statement of Work are clearly identified in Section 4 - Proposal Requirement.*

*The Mandatory Compliance Checklist is located at Appendix C (7.3).*

### **3.3 Statement of Work**

#### **3.3.1 Background**

*CMHC conducts a series of surveys of the rental market every fall. Structures containing three or more units that have been specifically built for rental purposes shall, for the intentions of this RFP, be referred to as the primary rental market. This market is comprised of privately owned apartment buildings and row house (townhouse) projects. The primary rental market is surveyed internally by CMHC. CMHC also conducts surveys of the secondary rental market, which is intended to cover the rest of the residential rental market in Canada. One key component of this survey is the Household Rent Survey (HRS) which is a Computer Assisted Telephone Interviews (CATI) of renters. The aim of this survey is to gauge rent paid by occupants of the secondary rental market, excluding those residing in condominiums.*

#### **3.3.2 Statement of Objectives**

- Conduct a telephone survey of households to collect information about rents from tenants in each of the following CMAs in September 2016: Victoria, Vancouver, Kelowna, Abbotsford, Calgary, Edmonton, Saskatoon, Regina, Winnipeg, Windsor, St. Catharines-Niagara, Hamilton, Barrie, Ottawa, Toronto, Montreal, Quebec, Halifax, and St. John's;*
- Review and provide feedback to a pre-designed and tested survey questionnaire, and the data collection process with the objective of ensuring data quality. CMHC reserves the right to modify the questionnaire.*

#### **3.3.3 Scope**

##### **3.3.3.1 CATI Household Rent Survey (HRS)**

*Using the proposed questionnaire found in Appendix D (may be subject to minor changes), the proponent will test and finalize the questionnaire that will allow for the collection of secondary rental*

market data and recommend changes that may lead to quality improvement of the questionnaire. Any changes to the questionnaire must have final approval from CMHC. The proponent will pre-test the questionnaire using a variety of scenarios to assess the adequacy of the questionnaire, the suitability of interviewer instructions, and other survey procedures. The proponent will be required to develop and test any software programs used for administering the questionnaire and prepare specifications for coding, data capture, editing and imputation.

After finalization of the questions and procedures, the proponent will be required to conduct a CATI telephone survey of households using residential telephone numbers supplied by CMHC in the following CMAs: Victoria, Vancouver, Kelowna, Abbotsford, Calgary, Edmonton, Saskatoon, Regina, Winnipeg, Windsor, St. Catharines-Niagara, Hamilton, Toronto, Barrie, Ottawa, Montreal, Quebec, Halifax, and St. John's. For all surveyed centres, the proponent will conduct interviews in both French and English, depending on the language preference of the respondent. The interviewer must provide an active offer to all respondents so that respondents know the survey is available in the other languages. The proponent may be asked at CMHC's discretion to survey respondents who speak only Mandarin, Cantonese, Italian, Panjabi, Tagalog and Spanish. CMHC will supply the proponent with the questionnaire in French and English only.

The proponent must call each telephone number supplied by CMHC. For numbers that result in a busy signal or no answer, the proponent will be required to attempt a minimum of three 'call-backs' at varying days and times and a maximum number of 'call-backs' identified by CMHC before the survey begins in an effort to reach the respondent before the number is indicated as a non-response. These non-responses must be recorded. The proponent must also record any refusals in addition to the responses of the survey. Unless prior approval is obtained from CMHC, calling hours are restricted to weekdays (Monday to Friday) between 9:30 AM and 9:00 PM and weekends (Saturday and Sunday) between 10:00 AM and 6:00 PM. Restriction hours refer to the time zone of the household receiving the telephone call.

The number of residential telephone numbers that CMHC will provide to the proponent may vary by CMA. The estimated number of telephone numbers for each CMA is listed below:



**Table I: Estimated Sample Sizes and Required Number of Completed Interviews by CMA for Household Rent Telephone Survey**

CMA	Initial Sample Size	Minimum Required Completed Interviews
Abbotsford	31,800	5,000
Barrie	32,700	5,000
Calgary	40,100	7,700
Edmonton	32,900	4,700
Halifax	35,000	5,350
Hamilton	67,500	5,000
Kelowna	52,900	5,200
Montreal	53,400	5,500
Ottawa	56,500	5,500
Quebec	45,500	5,900
Regina	38,500	5,500
Saskatoon	37,500	5,500
St. Catharines - Niagara	32,700	5,000
St. John's	41,300	5,100
Toronto	78,800	10,000
Vancouver	69,600	8,000
Victoria	41,600	5,400
Windsor	56,400	5,000
Winnipeg	52,500	6,500
<b>Total</b>	<b>897,200</b>	<b>110,850</b>

The minimum number of completed interviews which are necessary for each CMA is listed in the table above. A completed interview for the purpose of this project is defined as an interview where the respondent qualifies for the survey and all applicable questions are asked. The respondents will qualify for the survey if they are 18 years and older and the phone number does not belong to a business, nursing home, health care facility, retirement home, hotel, vacation home or rooming house. Completions include responses from both owner and renter households. The proponent should note that even if the minimum required completed interviews has been met, all telephone numbers in the sample must be contacted and the appropriate call-back procedure followed.

The following table provides the response from the 2015 iteration of the survey.

**Table 2: Household Rent Survey Response**

<b>CMA</b>	<b># of Completions / Total Dialed Sample</b>
Abbotsford	11%
Barrie	10%
Calgary	11%
Edmonton	11%
Halifax	15%
Kelowna	10%
Montreal	11%
Ottawa	13%
Quebec	12%
Regina	20%
Saskatoon	14%
St. John's	15%
Toronto	10%
Vancouver	11%
Victoria	7%
Winnipeg	8%
<b>Total</b>	<b>12%</b>

If the proponent is unable to complete the required number of interviews using the sample provided, CMHC will provide an additional sample of telephone numbers where available. The size of the additional sample will be discussed with the proponent. CMHC's objective is to provide only one subsequent sample for each CMA (when necessary). Once again, each number in the new sample must be contacted and the appropriate call-back procedure followed.

While CMHC will attempt to provide sufficient sample for the survey firm to meet all minimum required completion levels, there may be some areas where insufficient sample will be available. In these cases, the proponent will complete the calling procedures for all telephone numbers available and ensure that CMHC is aware of the sample shortfall.

### **3.3.3.2 Reporting for HRS**

#### **Daily Status Reports**

The proponent will provide on a daily basis a cumulative status report for the survey. The format of the status report is provided below.

**Table 3: Status Report Format**

HRS	All 19 CMAs						
	Total	Abbotsford	Barrie	...	...	Windsor	Winnipeg
Total Sample							
Number of telephone numbers called							
Number of completed surveys: Q1=Yes, Q2=Yes or Q2=No							
Number of owners: Q1=Yes							
Number of renters: Q2=Yes							
Number of neither owners or renters: Q2=No							
Number of refused surveys: Int01=No, refusal							
Number of telephone numbers that will be called back							
Number of telephone numbers at question Int04, Int05 or Int06 with Yes as answer							
Number of telephone numbers from which no response could be obtained or which were determined to be invalid (e.g., fax, business, not in use)							
Other terminations							
Number of telephone numbers that have not yet been contacted							
Q1 Yes							
Q1 DK/Refused							
Q2 Yes							
Q2 No							
Q2 DK/Refused							
Q4b Single-detached house							
Q4b Row house or townhouse							
Q4b Semi-detached house or double							
Q4b Duplex							
Q4b DK/Refused							
Q4c No							
Q4c DK/Refused							
Q4d Yes							
Q4d DK/Refused							
Q5b DK/Refused							
Q5c No							
Q5c DK/Refused							
Q5d Yes							
Q5d DK/Refused							
<b>Total</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

### Call Log

The proponent will provide CMHC on a weekly basis a cumulative call log file for the survey which details the calling progress on each survey. The call log should include all the calling attempts to each phone number. The file format should be either SAS or TEXT and the layout of call log is provided below. The proponent must provide CMHC with secure, easy and timely access to this file.

**Table 4: Call Log Layout**

Telephone Number	Geocode (Supplied by CMHC)	Date	Start Time*	Duration (min)	End Time*	Language	Result**

\*24 hr Format, Eastern Daylight Time

\*\*Completion, Refusal, No Response, Invalid Number, Do Not Call, etc.

### Raw Data Files

The proponent will provide CMHC on a weekly basis a cumulative raw SAS data file of the survey results for the survey complete with labels and values, results and all telephone numbers, ensuring that any variables provided to the proponent are included in the file. The file format should be either SAS or TEXT and the file layout should be formatted in accordance to CMHC's specifications. The proponent must provide CMHC with secure, easy and timely access to this file.

### Final Raw Data Files

Once the survey is completed the proponent will produce a raw SAS data file of the survey results complete with labels and values, results, call status, and all telephone numbers, ensuring that any variables originally supplied by CMHC remain with the response for the survey. The file format should be either SAS or TEXT and the file layout should be formatted in accordance to CMHC's specifications. The proponent must provide CMHC with secure, easy and timely access to this file. No detailed analysis or reporting of the results will be required.

### **Final Call Log**

Additionally, at the end of the survey, the proponent will provide CMHC with a detailed call log for each survey. The final call log file will contain all call attempts for each phone number and will be formatted like the call log layout shown above. The proponent must provide CMHC with secure, easy and timely access to this file.

### **Field Operation Report**

Upon completion of the survey, the proponent will produce a field operations report showing, for each CMA, the disposition of all calls and call attempts, response rates, flow rates and a discussion of any logistical problems that may influence data interpretation or future survey. As well, the proponent will produce a short report outlining any insight into shortcomings or problems with the survey questionnaire, survey design, data collection method and the expected quality of the data.

### **Recordings**

During the conduct of each survey the proponent will be required to provide recordings of the telephone calls for specific telephone numbers to monitor the quality of the conduct of the survey.

## **3.3.4 Deliverables and Schedule**

### **Pre-Testing**

1. Professionally review and revise as necessary based on CMHC approval, the questionnaire for the Household Rent Survey, which is included in Appendix D of this document. Given this is an ongoing survey; changes are expected to be minimal. CMHC will provide French version of the questionnaire to the contractor.
2. Develop and test CATI programming of the questionnaire.
3. Prepare briefing documents and appropriately train interviewers to ensure a clear understanding of terms and definitions used in the questionnaire.
4. Pre-test the questionnaire for the Household Rent Survey. Send raw data file and call log file schemas, raw data file and call log file of the pre-test results as well as requested recordings to CMHC. Hold a review session for CMHC to discuss the results of the pre-test to ensure desired results are being achieved. Make adjustments to the questionnaire, raw data files and call log files.

### **Survey Conduct**

1. Complete the Household Rent Survey following the methodology outlined in the Scope of Work section of this RFP.
2. On a daily basis, provide a cumulative status report which summarizes survey results by CMA achieved on the previous day and survey activities to date.
3. On a weekly basis, provide CMHC with cumulative call log files in SAS or TEXT file format and the corresponding table schema which details the calling progress.
4. On a weekly basis, provide CMHC with cumulative raw data files in SAS or TEXT file format and the corresponding table schema. CMHC understands that this data will be preliminary, and will require cleaning upon completion of the survey. This data should be formatted according to the guidelines provided to the contractor by CMHC. These guidelines will be provided prior to the commencement of the survey.
5. If initial samples are exhausted prior to achieving the minimum number of completions for any quota group, CMHC will provide an additional sample of telephone numbers, the size of which will be

discussed with the contractor. CMHC's objective is to provide only one subsequent sample for each CMA (when necessary). All telephone numbers in the subsequent sample must be contacted and the appropriate call-back procedure followed.

6. Upon completion of the survey, provide the final call log and raw data files of final survey results in SAS or TEXT file format and the corresponding table schema, including labels and values, call status, results, and telephone numbers, ensuring that the geo-coding originally supplied by CMHC remains with the response. This data should be formatted according to guidelines provided to the contractor by CMHC. Although no detailed analysis will be required, it is expected that the contractor will design their own reports for quality control.
7. Upon completion of the survey develop a field operations report, showing the breakdown of all call results, attempts and response rates for each CMA. This will also include a debriefing of any issues that might impact the interpretation of the data, any shortcomings of the methodologies employed, and recommendations that could be implemented for futures studies. The field operations report will also include the number of survey hours completed by CMA and the associated flow rate for each CMA for each survey.

The contractor will adhere to the following schedule:

**Table 5: Household Rent Survey Schedule**

Phase	Task	Lead	Start Date	End Date
Surveys Pre-Testing	Provide questionnaire to Proponent	CMHC	27-Jul-16	27-Jul-16
	Survey training	Proponent	27-Jul-16	12-Aug-16
	Provide pre-testing telephone sample to Proponent	CMHC	12-Aug-16	12-Aug-16
	Pre-testing of questionnaire	Proponent	15-Aug-16	19-Aug-16
	Send pre-testing results to CMHC	Proponent	22-Aug-16	22-Aug-16
	Make final changes to questionnaire	CMHC, Proponent	22-Aug-16	26-Aug-16
HRS in all CMAs	Provide telephone sample to Proponent	CMHC	24-Aug-16	24-Aug-16
	Survey conduct and administration	Proponent	01-Sep-16	30-Sep-16
	Daily status report sent to project team	Proponent	01-Sep-16	30-Sep-16
	Weekly status report, call log and raw data files sent to CMHC	Proponent	01-Sep-16	30-Sep-16
	Data file preparation	Proponent	01-Oct-16	06-Oct-16
	Delivery of final call log and raw data files	Proponent	07-Oct-16	07-Oct-16
Surveys Review	Field operations report	Proponent	20-Nov-16	20-Nov-16
	Survey review report	CMHC	27-Nov-16	27-Nov-16
	Survey review meeting	Proponent, CMHC	04-Dec-16	04-Dec-16

### 3.3.5 Roles and Responsibilities of CMHC

- Provide first version of survey questionnaire in both English and French.
- Translate the final version of questionnaire after all edits into French and/or English.

- *Five days before the survey commences, CMHC will provide the selected proponent with a Call List of potential respondents per centre.*
- *Provide additional Call List upon a request made by the selected proponent.*
- *Provide survey review report to the Proponent at the end of the survey and organize survey review meeting between CMHC and Proponent.*

### **3.3.6 Manner of Payment**

*For survey work, the contractor will be paid according to the number of completions. For the purposes of this Agreement, a completion is defined as an interview where all applicable questions in the interview have been asked by the interviewer and that we can determine is the respondent is a renter, an owner, or neither. It is possible that CMHC may have insufficient telephone numbers to provide the initial sample size indicated or to provide subsequent samples. If all telephone numbers available to CMHC have been provided to the contractor and the contractor is unable to fulfill the minimum number of completions in any CMA because of a lack of telephone numbers received from CMHC, the price of the work will be adjusted accordingly. If CMHC decides prior to the launch of the survey to increase or decrease the number of completions required for any centre, or to add additional centres or remove proposed centers, the price of work will be adjusted accordingly.*

## **4 SECTION 4 PROPOSAL REQUIREMENTS**

### **4.1 Overview of Section 4**

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

#### *Response Items*

<b>#</b>	<b>Item</b>
4.3	Covering Letter
4.4	Table of Contents
4.5	Executive Summary
4.6	Proponent's Qualifications
4.7	Response to Statement of Work
4.8	Project Management Plan
4.9	Financial Information
4.10	Other Information
4.11	Pricing Proposal

*Elaborate or unnecessarily voluminous proposals are not desired. Proponents are encouraged to take care in completely answering questions and proposal requirements and to avoid submitting extraneous materials that do not show how the proponent intends to meet requirements.*

*Requirements for each Response Item are detailed below.*

### **4.2 Mandatory Proposal Requirements**

*Certain requirements in section 4 are identified as mandatory. See Section 1.7 for a description of mandatory requirements.*

### **4.3 Covering Letter**

*A covering letter on the proponent's letterhead should be submitted and include the following:*

- (a) *A description of the company or joint venture/consortium.*
- (b) *The names of the individuals who are the principals of the proponent.*
- (c) *Contact information for the primary contact person with respect to this RFP including the individual's name, address, contact numbers by phone and fax, and contact e-mail address, if available.*
- (d) *The locations of primary and all other offices that would be servicing the Agreement.*

### **4.4 Table of Contents**



The proponent shall include a table of contents using the response item headings and numbering system identified in this section of the RFP. The response should be paginated for easy referencing by the evaluation committee.

#### **4.5 Executive Summary**

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

- (a) Key features of the proposal, features that make the proposal advantageous for CMHC, innovative approaches to meeting the requirement and cost-saving opportunities.
- (b) A brief statement of the proponent's qualifications to meet CMHC's stated requirements.

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

#### **MANDATORY**

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

- (a) A description of the proponent's organization, its history, legal status, number of full-time employees and areas of specialization.
- (b) Résumés for all personnel who would be assigned to the project, including subcontractors, if any. CMHC is expecting personnel to have experience in related projects and studies in related fields.
- (c) A list of references that includes all contracts of a similar size and scope which the proponent currently holds or has held over the past 36 months with the name and address of the other party to the contract, and a contact person name and phone number. Note that by providing this information, the proponent provides consent to CMHC to contact the contact persons for the purpose of collecting information relating to the quality of work provided by the proponent.
- (d) Information about office location(s) answering the following questions: If awarded this Agreement, which office would provide support services? How many personnel are located in this office and what is their specific experience with the proposed work?

#### **4.7 Response to Statement of Work**

#### **MANDATORY**

In this section, the proponent should provide detailed information relative to the specifications listed in Section 3, The Statement of Work.

Proponents should outline the proposed methodology for conducting the work, noting any differences from the methodology and deliverables in Section 3. Proponents should outline the manner in which these activities will be conducted and all resources anticipated to be required for each phase. Proponents must demonstrate the ability to complete the project within the designated time frame.

The proponent must demonstrate the capability of completing the survey for respondents who speak French or English. These are minimum language requirements. The proponent shall also indicate their multilingual capabilities for respondents who speak only Mandarin, Cantonese, Italian, Panjabi, Tagalog and Spanish.

*In addition, the proponent shall demonstrate their understanding of the project objectives and current and emerging issues beyond what is already specified in this RFP. Proponents are requested to identify anticipated difficulties that may be encountered in carrying out this research and to outline how they plan to address such difficulties.*

#### **4.8 Project Management Plan**

#### **MANDATORY**

*The proponent shall describe its project management plan including:*

- (a) *Project Management Approach. The proponent shall describe its project management approach and the project management organizational structure including reporting levels and lines of authority.*
- (b) *Quality Control. The proponent shall describe its approach to quality control including:*
  - *details of the methods used in ensuring quality of the work, and*
  - *response mechanisms in the case of errors, omissions, delays, etc.*
- (c) *Status Reporting to CMHC. The proponent shall describe its status reporting methodology, including details of written and oral progress reporting methods.*
- (d) *Work Schedule. The proponent shall describe the method it will use to ensure compliance with the work schedule.*
- (e) *Interface with CMHC. The proponent shall describe and explain*
  - *its intended interface points with CMHC*
  - *all available interface mechanisms, and*
  - *how interface issues and difficulties will be resolved.*
- (f) *The proponent's plan for ensuring continuous improvement of its practices and procedures for delivering the services.*

#### **4.9 Financial Information**

#### **MANDATORY**

*Proponents are not expected to submit confidential financial information with their proposal, however CMHC reserves the right to conduct an assessment of the Lead Proponent(s) financial capacity. Once a lead proponent is selected following the RFP evaluation process, CMHC may request the financial information necessary to confirm the financial capacity of the proponent. This section details the review that may be conducted and the documents that are required of the lead proponent.*

*Failure to comply with the financial information submission requirements set out in this section, will result in disqualification of the lead proponent(s) at which time no further consideration will be provided to the respective submission(s).*

##### **4.9.1 Financial Capacity Review**

*Once identified, the lead proponent(s) may be requested to provide CMHC the following information, within 72 hours of CMHC's request to permit an analysis of the financial capacity of the lead proponent(s):*

##### **Partnerships, Corporations, Joint Ventures and Consortiums:**

Proponents must provide a complete set of signed, detailed, audited financial statements for each of the last three (3) years, and any other relevant financial information that CMHC may subsequently request. The auditor's report accompanying the financial statements must be signed by an appropriate officer of the audit firm.

In the event that the financial statements are not audited, they must be accompanied by a signed review engagement report for each set of annual statements.

A complete set of financial statements consists of all the following items:

1. Auditor's Report (or Review Engagement Report),
2. Balance Sheet,
3. Income Statement,
4. Cash Flow Statement,
5. The Notes to the Financial Statements, and

In the case of a joint venture or consortium, each and all members of the joint venture or consortium must provide the required information. Partnerships of individuals (as opposed to partnerships of corporations), must provide written permission from each partner allowing CMHC to perform a credit check on them.

### **Sole Proprietorships**

Proponents that are organized as sole proprietorships must provide a statement contained within their proposal giving written permission for CMHC to perform a credit check as required. Where financial statements are available, they should accompany the foregoing statement.

#### **4.10 Other Information**

The Proponent may provide other relevant financial information, but is not obligated to do so.

#### **4.11 Pricing Proposal**

#### **MANDATORY**

The proponent must provide a response outlining the pricing of its proposed solution in a detailed manner.

All prices and amounts of money in the proposal are to be quoted in Canadian dollars and be exclusive of the Goods and Services Tax (GST), Harmonized Sales Tax (HST), and Provincial Sales Tax (PST), as applicable, unless otherwise indicated. The GST, HST or PST, whichever is applicable, shall be extra to the price quoted and will be paid by CMHC.

The proponent must submit a fixed (firm) price as per the table below. In addition, the proponent must submit pricing information that indicates how the fixed price was calculated, referencing the following:

#### **Household Rent Survey**

Time and cost estimates, including start and completion dates, for every aspect of the work including:

- Questionnaire review, training and pre-testing of questions
- Survey conduct and administration
- Preparation of data files
- Report production

The proponent must complete the following pricing and timing grid. The pricing in this grid should only include the conduct of the survey in English and French.

**Table 6: Pricing and Timing Grid for the Household Rent Survey**

Task	Price	Proposed Start Date	Proposed Completion Date
Questionnaire review, training and pre-testing of questions			
Survey conduct and administration			
Preparation of all interim and final data files			
Report production			
<b>Total</b>			

CMHC will use price adjustments to increase or decrease the amount paid to the proponent due to an increase or decrease in the number of completions or questions in the questionnaire. Price adjustments include:

- Insufficient sample and the proponent is unable to fulfill the minimum number of completions for any CMA as outlined in Table 1.
- CMHC decides prior to launch of the survey to increase or decrease the number of completions required for any CMA, or add or remove CMAs, such that the minimum number of completions required is greater than or less than those outlines in Table 1.
- CMHC changes the number of questions through the addition or removal of questions in the questionnaire.

The proponent must complete the following price adjustment grid. This price adjustment grid is not part of the evaluation preprocess and should be submitted through a signed and sealed envelope separate from the main response. CMHC reserves the right to discuss the pricing for the items in the price adjustment grid before the contract is finalized.

**Table 7: Pricing Adjustments for the Household Rent Survey**

Task	Price
Each completion less than those outlined in Table 1.	-
Each completion greater than those outlined in Table 1.	
Each question less than the number of questions in Appendix D.	-
Each question greater than the number of questions in Appendix D.	

## **5 SECTION 5 EVALUATION AND SELECTION**

### **5.1 Overview of Section 5**

*Section 5 describes the process CMHC will use to evaluate proposals, select a lead proponent and finalize and sign an agreement.*

*CMHC commits to conducting the evaluation process in a fair and objective manner and treating all proponents equitably. To this end, it has set out detailed terms and conditions and evaluation criteria which will be applied uniformly to all proponents.*

*As per section 2.11, by submitting a proposal, proponents agree to relinquish all causes of action, claims, complaints or demands that they may have against CMHC arising out of its evaluation of proposals, the alteration of any terms and conditions, the failure to evaluate any proposal, the failure to sign an agreement with a proponent, or the termination of this RFP process.*

**CMHC intends to conduct the RFP process such that the proposal that represents the best value to CMHC, based on its operational requirements, is selected. The lowest cost proposal will not necessarily be selected. CMHC reserves the right to reject any or all proposals in whole or in part on the basis of this principle.**

### **5.2 Limitation of Damages**

*The proponent, by submitting a proposal and subject to section 2.11, agrees that under no circumstances will it claim damages in excess of the reasonable costs incurred by the proponent in preparing its proposal. The proponent waives any claim for loss of profits or other indirect or special damages.*

### **5.3 Evaluation Table**

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

### **5.4 Evaluation Methodology**

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

*Each compliant proposal shall be individually evaluated by each member of the Evaluation Committee, made up of qualified personnel. Evaluators shall evaluate and numerically score each proposal in accordance with the evaluation criteria as shown in the Evaluation Table, Appendix "B". Once individual evaluations are complete, the Evaluation Committee will discuss and agree upon a final score for each proposal.*

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

The pricing for each compliant proposal that meets the minimum upset scores in each category shall then be evaluated using the 'ratio method'.

With this method, the proposal with the lowest cost receives the maximum points allowed. All other proposals receive a percentage of the points available based on their cost relationship to the lowest. This is determined by applying the following formula:

$$\frac{\text{Lowest Cost}}{\text{Cost Being Evaluated}} \times \text{Maximum Points Available} = \text{Awarded Points}$$

Cost Being Evaluated

Example: The cost for the lowest proposal is \$100,000. The next lowest proposal has a cost of \$125,000. The total points available for cost = 100 points.

$$\frac{\$100,000}{\$125,000} = .80 \times 100 = 80 \text{ points}$$

A lead proponent will be identified based on the Committee's evaluation.

## 5.5 Financial Evaluation

Once a lead proponent is identified, CMHC may carry out a credit check and/or a financial capacity on the lead proponent. The financial evaluation will be based on the information that is requested as per Section 4.9 of this RFP.

The financial evaluation is a pass/fail evaluation to determine whether the lead proponent has the financial capacity required to provide CMHC with reasonable assurance that it will be able to meet its obligations if it enters into an agreement with CMHC. If the lead proponent passes the financial evaluation, CMHC is then in a position to begin contract negotiations. If the lead proponent fails the evaluation, it is disqualified from further consideration.

## 5.6 Proponent Selection

Once a lead proponent has passed the financial evaluation, CMHC has the option of entering into negotiations with that proponent to incorporate some or all of its proposal into an agreement. If at any time CMHC decides that the lead proponent cannot satisfy CMHC's requirements, CMHC may terminate negotiations. If at this time CMHC feels that the secondary proponent may meet the requirements, CMHC will continue the process with the secondary proponent and so on.

By submitting a proposal, proponents agree that if they are selected as lead proponent, they will enter into contract negotiations in a timely manner and in good faith, and within the framework of the RFP and the proponent's response to the RFP.

Announcement of the successful proponent will be made to all proponents following the signing of an agreement.

## **6 SECTION 6 DRAFT AGREEMENT**

### **6.1 Overview of Section 6**

*Attached in Section 6.2 is a draft agreement containing terms and conditions that will form the basis of the agreement resulting from this RFP. CMHC reserves the right to add, delete or revise terms and conditions during negotiations.*

*Terms and conditions identified as “Mandatory” in the RFP or draft Agreement must be included in the agreement. The proponent’s proposal and all associated correspondence from the proponent, where relevant, shall to the extent desired by CMHC, also form part of the resulting contract.*

**Submission of a proposal constitutes acknowledgement that the proponent has read and, unless otherwise stated in the proponent’s proposal, agrees to be bound by the terms and conditions in the draft agreement in the event that the proponent is selected by CMHC to enter into a contract.**

*For the purposes of this section the term “Contractor” refers to the successful proponent with whom CMHC enters into an agreement.*

### **6.2 Draft Agreement**

## DRAFT AGREEMENT

CMHC FILE No. [Click here to enter text.](#)

### THIS AGREEMENT (the “Agreement”)

#### **BETWEEN CANADA MORTGAGE AND HOUSING CORPORATION**

*National Office  
700 Montreal Road  
Ottawa, Ontario, Canada  
K1A 0P7  
(hereinafter referred to as "CMHC")*

#### **AND [Click here to enter text.](#)**

*(hereinafter referred to as "the Contractor")  
(individually a “Party”, collectively the “Parties”)*

**WITNESSES THAT** *in consideration of the respective covenants and agreements of the parties, CMHC and the Contractor mutually covenant and agree as follows:*

#### **Article 1.0 - The Services**

- 1.1** *The Contractor covenants and agrees to provide [Click here to enter text.](#) in accordance with the Statement of Work attached as Appendix “A” (the “Services”). [{Provide general description of services.}](#)*
- 1.2** *The Contractor represents that it possesses the requisite skills and experience to perform the Services in accordance with the terms and conditions of the Agreement. The Contractor warrants that the Services will be performed in a professional manner and in accordance with accepted industry standards.*
- 1.3** *A complete list of CMHC sites to be serviced is provided in the RFP and shall form part of this Agreement.*

#### **Article 2.0 - Term of the Agreement**

- 2.1** *The term of the Agreement shall be for a period of [Click here to enter text.](#) commencing on [Click here to enter text.](#) and terminating on [Click here to enter text.](#) (the “Initial Term”)*
- 2.2** **Renewal**



The Agreement may be renewed at CMHC's sole discretion for [Click here to enter text.](#) additional, [Click here to enter text.](#) year terms, not to exceed a cumulative total of [Click here to enter text.](#) years.

## **2.3 Termination**

### **No fault termination**

Notwithstanding articles 2.1 and 2.2 above, CMHC may terminate the Agreement for any reason with no penalty or charge by giving thirty (30) days written notice at any time during the Term.

### **Termination for Default of Contractor**

CMHC may, by giving 10 days prior written notice to the Contractor, terminate this Agreement without penalty or charge for any of the following reasons:

1. The Contractor commits a material breach of its duties under this Agreement, unless the Contractor cures such breach and indemnifies CMHC for any resulting damage or loss, both in a manner satisfactory to CMHC in its sole, absolute and non-reviewable discretion, within twenty (20) calendar days of receipt of written notice of breach from CMHC;
2. The Contractor commits numerous breaches of its duties under this Agreement that collectively constitute a material breach;
3. There is a change in control of the Contractor where such control is acquired, directly or indirectly, in a single transaction or series of related transactions, or all or substantially all of the assets of the Contractor are acquired by any entity, or the Contractor is merged with or into another entity to form a new entity, unless the Contractor demonstrates to the satisfaction of CMHC that such event will not adversely affect its ability to perform the services under this Agreement; or
4. The Contractor becomes bankrupt or insolvent, or a receiving order is made against the Contractor, or any assignment is made for the benefit of the creditors, or if an order is made or a resolution passed for the winding up of the Contractor.

CMHC may terminate this Agreement without notice if the Contractor commits gross misconduct, fraud or other unlawful acts.

### **CMHC's Obligations upon Termination**

In the event that a notice of termination is given, and subject to the deduction of any claim which CMHC may have against the Contractor arising out of the Agreement or its termination, CMHC will be obliged to make payment for the value of all Services performed to the date of the notice, such value to be determined in accordance with the rate(s) specified in the Agreement. CMHC will make payment within thirty (30) days of the date of the notice or

receipt of an invoice submitted by the Contractor, whichever is later. Upon such payment, it shall have no further obligation or liability of any kind to the Contractor.

### **Contractor's Obligations upon Termination**

Upon termination of this Agreement or upon delivery of notice of intent to terminate this Agreement, the Contractor shall promptly review all work in progress and forward it to CMHC. The Contractor shall provide CMHC with reasonable transitional assistance at the rates specified in the Agreement, or if no rates are specified at the contractor's standard rates.

## **2.4 Termination Assistance**

Commencing six (6) months prior to expiration of the Term or on such earlier date as CMHC may request, or commencing upon any notice of termination or non-renewal of this Agreement, the Contractor shall provide CMHC with reasonable termination assistance as requested by CMHC to allow the services to continue without interruption or adverse effect and to facilitate the orderly transfer of the services to CMHC or its designee.

## **Article 3.0 – Financial**

- 3.1** In consideration of the performance of the services, as described in Article 1.0, CMHC agrees to pay the Contractor an amount based on the Contractor's rates attached as Schedule B. Notwithstanding the foregoing, under no circumstances shall CMHC's total financial liability under the Agreement exceed \$ [Click here to enter text.](#) for Services provided during the initial term of the Agreement. Pricing increases may be negotiated for each successive renewal term where applicable.
- 3.2** The amount payable to the Contractor by CMHC pursuant to article 3.1 is inclusive of all taxes, assessments, duties or other levies that may be payable, including any goods and services tax/harmonized sales tax (GST/HST) or retail sales tax (RST). No other taxes, assessments, duties or other levies shall be payable to the Contractor unless specifically agreed in writing by the Contractor and CMHC.
- 3.3** Notwithstanding article 3.2 above, GST/HST or RST, to the extent applicable and required to be collected, shall be collected by the Contractor and shown as a separate item on each invoice. Where the Contractor is required to collect the GST/HST, the invoice issued by the Contractor shall show the Contractor's GST/HST number. Where the Contractor is also required to collect the Quebec Sales Tax (QST), the invoice shall show the QST number. The Contractor shall duly remit to the Canada Revenue Agency or the appropriate provincial taxing authorities all taxes payable on the Services.

**{Contracting party to choose version I or version II when contracting for services with a non-resident of Canada.}**

### **Version I**

Any payments made to the Contractor 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 amounts payable to the Contractor, CMHC shall make such withholdings and duly and promptly remit the amount withheld to the Canada Revenue Agency.

### **Version II**

Notwithstanding article 3.2 above, any payments made to the Contractor 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 Contractor, CMHC shall

- (i) make such withholdings and duly and promptly remit the amount withheld to the Canada Revenue Agency; and
- (ii) record as a credit note the additional amounts to the Contractor so that the net amount received by the Contractor after such withholdings will not be less than the amount the Contractor would have received had such withholding taxes not been withheld.

## **3.4 Invoicing**

The Contractor shall submit detailed invoices to CMHC at regular intervals during the Term, and at least on a quarterly basis, describing the Services provided during the period covered by the invoice. The Contractor must allow 30 days from delivery of invoice for payment without interest charges. The Contractor cannot invoice prior to performance of the Service.

All invoices must make reference to this Agreement by quoting CMHC file number [Click here to enter text](#).

Before advancing any amount to the Contractor, CMHC reserves the right to determine, in its sole and absolute discretion, whether the services were performed in accordance with the terms and conditions of the Agreement. In the event that the services do not meet the standards set out in the Agreement, CMHC may take such action as reasonably necessary to correct the Contractor's default, including, without limitation, the following:

- a) directing the Contractor to redo the work that was not completed in accordance with the Agreement;
- b) withholding payment;

- c) *setting off any expenses incurred by CMHC in remedying the default of Contractor against payment for payment due to the Contractor;*
- d) *terminating the Agreement for default.*

### **3.5.1 Method of Payment**

*All payments due under the Agreement will be made by means of Electronic Funds Transfer (“EFT”). The Contractor is responsible for providing CMHC with all the information set out in section 3.5.2 to allow EFT to be effected and for keeping the information up to date. In the event that CMHC is unable to make payment by EFT, the Contractor agrees to accept payment by cheque or another mutually agreeable method of payment.*

### **3.5.2 Direct Deposit and Income Tax Reporting Requirement**

*As a federal Crown Corporation, CMHC is obliged under the Income Tax Act and Regulations to report payments 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 CMHC to make payment by EFT and to complete the T1204 supplementary slip. The Contractor is required to complete and sign a Supplier - Direct Deposit and Tax Information Form (CMHC/SCHL 3085) prior to commencement of the Term. Throughout the Term, the Contractor is required to ensure that the information provided remains accurate and up to date. The Contractor assumes full responsibility for any errors in payments or tax reporting that arise because the information supplied is inaccurate or out of date.*

### **3.6 Audit**

*The Contractor shall maintain proper and standard records and accounts during the Term and for a period of three (3) years following the end of the Term. The Contractor agrees to allow CMHC’s internal and external auditors the right to examine, at any reasonable time, any and all records relating to the services identified herein.*

*The Contractor agrees to provide the CMHC’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 CMHC agrees to cooperate with the Contractor in the course of conducting any audit in order to avoid disruption in day-to-day operations and to preserve confidentiality of any proprietary information that is disclosed.*

## **Article 4.0 - General Terms and Conditions**

### **4.1 Intellectual Property Rights**

All material, reports and other work product produced under the Agreement will become the sole property of CMHC upon coming into existence and CMHC will hold all intellectual property rights therein. The Contractor warrants that it has sufficient rights to satisfy this term, and that any necessary waivers of moral rights have been obtained, as provided for in the law of copyright. Upon the material coming into existence, the Contractor hereby assigns all rights in the material to CMHC and agrees to execute any document requested by CMHC acknowledging CMHC's ownership of the material and work product and the waiver of moral rights therein.

Nothing in this Agreement is intended to affect the pre-existing Intellectual Property Rights of the Parties, and all personal information, whether or not it is marked as confidential.

#### **4.2. Confidentiality and Non-Disclosure of CMHC Information      MANDATORY**

In this section, "CMHC Information" refers to any and all information of a confidential nature, including all personal information, that is in the care or control of CMHC, and is managed, accessed, collected, used, disclosed, retained, received, created or disposed of in relation to the provision of the Services, however the information is obtained. Without limiting the generality of the foregoing, CMHC Information includes data in any format and information obtained directly or indirectly by the Contractor.

**The Contractor understands the sensitive nature of the CMHC Information and agrees to treat all CMHC Information as proprietary, confidential and sensitive during the Term and following termination of the Agreement, unless otherwise specifically agreed to in writing by CMHC. The Contractor further agrees to restrict access to CMHC Information to those persons who have a need to know this information in order to perform the Services and who are bound by an obligation of confidentiality that is as strict as that contained in this Agreement.**

**In the event that a breach of confidentiality occurs, the Contractor will immediately notify CMHC and co-operate with CMHC to the extent required to remedy the breach.**

Where the Services are sensitive in nature, CMHC may require that the Contractor provide an Oath of Secrecy for each of its employees or persons engaged in performing the Services.

The Contractor further acknowledges and understands that CMHC considers all CMHC information to be under its custody and control at all times, and that all information in the care and control of CMHC is subject to federal laws on privacy and access to information.

Any documents provided to the Contractor in the performance of the Services shall be returned, uncopied to CMHC or destroyed by the Contractor immediately following the termination of this Agreement. For documents not returned to CMHC, the Contractor shall provide specific proof under oath of their destruction.

*The Contractor shall ensure that CMHC Information shall remain in Canada and expressly agrees to segregate CMHC Information, whether in electronic format or in hard copy, from other information by physical or electronic means. Without limiting the generality of the foregoing, the Contractor shall not and shall ensure that any subcontractor, reseller, agent or any other entity engaged to perform any portion of the Services does not release, share or otherwise divulge CMHC Information to any other entity including subsidiaries, branch offices, partners of the Contractor or subcontractors without the prior written consent of CMHC.*

#### **4.3. Contractor's Indemnification**

*The Contractor agrees to indemnify, defend and hold harmless CMHC, its officers, employees and agents, for all loss, damages, costs, expenses, claims, demands, actions, suits or other proceedings of every nature and kind, including legal fees, arising from or in consequence of an act or omission of the Contractor related to the performance of the Services. To the extent that CMHC's actions contribute to the loss or damages, CMHC shall be responsible for its proportionate share of the liability. The indemnification applies whether the actions, suits or proceedings are brought in the name of CMHC or in the name of the Contractor. The Contractor shall be fully responsible to CMHC for the acts and omissions (including negligence) of its subcontractors and of persons directly or indirectly engaged by such subcontractors as if such acts and omissions were those of the Contractor.*

*CMHC shall have the right to assume control of its own defence at any time, provided that it assumes the costs of its defence.*

#### **4.4. Independent Contractor**

*It is understood by the Parties that the Contractor shall act as an independent contractor for the purposes of the Agreement. It and its employees, officers, agents and contractors are not engaged as employees of CMHC. The Contractor agrees to so advise its employees, officers, agents and contractors.*

*Without limiting the generality of the foregoing, the Contractor shall retain complete control of and accountability for its employees, agents and contractors. The Contractor shall prepare and process the payroll for its employees directly, and shall withhold and/or pay all applicable employment taxes and statutory payroll deductions required in respect of its employees. All personnel employed by the Contractor at the beginning of the Term shall, at all times, and for all purposes, remain solely in the employment of the Contractor.*

#### **4.5. Contractor's Authority**

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

#### **4.6. Corporation Identification**

*It is agreed that the Contractor will make no use whatsoever of CMHC's name, logo or other official marks without the express written consent of CMHC.*

#### **4.7. Conflict of Interest**

#### **MANDATORY**

*The Contractor and its principals, employees, agents and subcontractors shall avoid any real, potential or apparent conflict of interest during the Term and shall declare any real, potential or apparent conflict of interest to CMHC immediately upon becoming aware of the conflict. The Contractor shall, upon direction of CMHC, take steps to eliminate any conflict, potential conflict or perception that a conflict of interest exists.*

*The Contractor must not provide any services to any third party in circumstances that might reasonably give rise to a conflict of interest between the Contractor's duties to that third party and the Contractor's duties to CMHC.*

*In the event that a conflict of interest, real, potential or perceived, cannot be resolved to the satisfaction of CMHC, CMHC shall have the right to immediately terminate the Agreement. All work product that has been completed at the date of termination shall be forwarded to CMHC and CMHC shall be liable for payment to the Contractor of an amount which, in the sole opinion of CMHC, constitutes reasonable payment for the partial performance of the Contractor's obligations under the Agreement. Upon such payment, CMHC shall have no further obligation of any nature or kind to the Contractor.*

*Any public office holder or former public office holder must be in compliance with the provisions of the Conflict of Interest Act in order to derive a direct benefit from any Agreement which may arise from this request for proposal.*

#### **4.8. Insurance Clause**

##### **a) Commercial General Liability insurance**

*The Proponent will provide and maintain Commercial General Liability insurance with an insurer licensed to do business in Canada with a limit of not less than \$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*
- *personal Injury*
- *blanket contractual liability*
- *employers liability (or confirmation that all employees including sub-contractors and independent contractors are covered by Workers Compensation)non owned automobile liability*
- *Canada Mortgage and Housing Corporation to be added as additional insured.*

- 30 days prior written notice of cancellation to CMHC's Senior Advisor, Corporate Insurance, 700 Montréal Road, Ottawa, Ontario K1A 0P7
- contractors liability to include operations of independent contractors (if not provided then each subcontractor must provide a certificate of insurance confirming that they have liability insurance as detailed in the RFP).

### **Other conditions**

*If there are material changes in the scope of Services provided under this Agreement, CMHC may, request changes to the minimum insurance coverages set out above.*

*All insurance policies required to be maintained by Proponent pursuant to this Section 4.8 shall be primary with respect to this Agreement and any valid and collectible insurance of CMHC shall be excess of Proponent's insurance and shall not contribute to it.*

*All Certificate of Insurance shall mention that insurers will provide CMHC with at least thirty (30) days' written notice prior to cancellation of any insurance referred to under this Section 4.8. In addition Proponent shall provide written notice to CMHC forthwith upon learning that an insurer described in this Section 4.8 intends to cancel, or intends to make or has made a material change to, any insurance referred to in this Section 4.8.*

*A Certificate of Insurance meeting the above requirements shall be delivered to CMHC upon execution of this Agreement and for each renewal thereafter.*

*Without in any way restricting CMHC's direction to grant or withhold its consent to a request to subcontract pursuant to Section 4.8, the Proponent agrees that it shall contractually obligate any subcontractor or independent contractor retained in connection with this Agreement to maintain insurance against such risks and in such amounts that having regard to such subcontractor's or independent contractor's involvement in the provision of the Services could reasonably be expected to be carried by Persons acting prudently and in a similar business to that of such subcontractor or independent contractor.*

*It shall be the sole responsibility of the Proponent to decide whether or not any other insurance coverage, in addition to the insurance requirements stipulated herein, is necessary for its own protection or to fulfill its obligation under the contract. All insurance policies shall be provided and maintained by the Proponents at its own expense.*

### **4.9. No Limitation**

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

### **4.10. Non-Compliance**

*If the Contractor fails to comply with a direction or decision of CMHC properly given under the terms of the Agreement, CMHC may take such actions and incur such costs that are reasonably*



*required to implement its direction including, without limitation, the engagement of another contractor and withholding of payment due to the Contractor for Services rendered, which moneys may be set off by CMHC against any expenses that it may incur in remedying a default or failures as described above.*

#### **4.11. Force Majeure**

*In the event that a Party is prevented from fulfilling its obligations under the terms of the Agreement by a force majeure or act of God (an event or effect that cannot be reasonably anticipated or controlled), the impacted Party shall notify the other Party in writing as soon as reasonably possible. The written notice shall be sent by registered mail and shall outline the circumstances that constitute a force majeure or an act of God, which may include, but are not limited to, war, serious public disturbances, impediments arising from orders or prohibitions of public authority, actions of public enemies, strikes, lockouts and other labour disputes, riots, flooding, hurricane, fire, explosion or any other natural disasters over which the Party has no reasonable control.*

*Where CMHC concludes, in its sole discretion, that the Contractor will not be able to fulfill its obligations under the Agreement, CMHC may secure the services of other qualified Contractors to perform the Services without further compensation or obligation to the Contractor.*

#### **4.12. Non-Waiver**

*Failure by either party to assert any of its rights under the Agreement shall not be construed as a waiver thereof.*

#### **4.13. Laws Governing Agreement**

*This Agreement shall be governed by and construed in accordance with the laws of the Province of Ontario and the laws of Canada as applicable. The parties attorn to the jurisdiction of the Federal Court or the courts of the Province of Ontario as appropriate in the circumstances.*

*The Contractor shall give all notices and obtain all licenses, permits and authorizations required to perform the Services. The Contractor shall comply with all the laws applicable to the services or the performance of the Agreement.*

#### **4.14. Final Report**

*Where a final report is to be prepared, it shall be in a form acceptable to CMHC and suitable for reproduction or publication. More particularly,*

- (i) the body of the report shall include the main factual and analytical information and policy recommendations shall be separated to minimize potential restriction;*
- (ii) policy recommendations and supporting materials shall be attached as appendices; and*
- (iii) the report shall stipulate that the copyright remains with CMHC.*

*Upon request, the Contractor will supply, an executive summary of the main findings and recommendations of the final report and a copy of the report in any standard format that CMHC may prescribe, in accordance with CMHC's information technology requirements.*

#### **4.15. Publication**

*In the case of a report that is in the nature of a research report, CMHC is under no obligation to publish all or part of the final report. CMHC has the right to edit or publish the final report, in part or in its entirety and shall be the sole judge of those parts of the final report, or those materials and reports, that it considers for publication. CMHC may, at its discretion, delete references to the Contractor in the edited version of the final report.*

*Where the Contractor wishes to publish the final report or its associated materials, the Contractor must request written permission from CMHC to publish all or part of the final reports. The Contractor must also acknowledge the ownership of copyright by CMHC and, if requested by CMHC must include the following disclaimer:*

*“This project was funded (or partially funded) by Canada Mortgage and Housing Corporation (CMHC), but the views expressed are the personal views of the author(s).*

*CMHC makes no representations as to the accuracy or fitness of the contents for any particular purpose.”*

#### **4.16. Official Languages**

#### **MANDATORY**

*The Contractor acknowledges and understands that CMHC is governed by the Official Languages Act and follows related Treasury Board Policies. The Contractor agrees to take any measures necessary to ensure compliance with the Act and those policies. When providing services to or communicating with CMHC employees, in person, over the phone or in writing (including electronic correspondence), the Contractor must actively offer bilingual services in and indicate clearly by verbal and/or visual means that employees can communicate with and obtain available services in either English or French. The Contractor must also ensure that there is sufficient capacity to provide services that are comparable in terms of quality and timeliness in both official languages.*

#### **4.17. Access to CMHC Property**

*The Agreement does not provide automatic access to CMHC premises. Where specified in the Agreement CMHC agrees to permit access by the Contractor's employees onto CMHC premises for the purpose of fulfilling its obligations as per the terms of this Agreement. However, CMHC reserves the right to refuse entry of Contractor's personnel for operational reasons. CMHC also will have the right at any time to remove from and/or refuse entry to its premises any incompetent or intemperate employee, or any employee who violates CMHC Safety and/or Security regulations or interferes with CMHC operations at the site.*

#### **4.18. Suspension of Services and Changes in Specifications**

*CMHC may, at any time and from time to time, order a suspension of the Services in whole or in part, and make modifications of, changes in or additions to the specifications of the type of Services offered and methods of delivery. All directions given by CMHC in writing with respect to the foregoing shall be complied with by the Contractor. If any such suspension, modification, change or addition results in an increase or decrease in the cost of the Services, the amount in Section 3.1 shall be adjusted accordingly, provided that the Contractor shall in no event be entitled to compensation for any loss of anticipated profits and provided further that minor increases or decreases in cost shall be disregarded.*

#### **4.19. Extras**

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

#### **4.20. Assignment of the Agreement**

*The Agreement shall not be assigned in whole or in part by the Contractor without the prior written consent of CMHC, which may be withheld for any reason.*

*It is understood and agreed that the Contractor may engage other entities to assist with the Contractor in providing of the Services, provided that the Contractor shall at all times retain full responsibility for the provision and quality of the Services and acts in a manner which fully recognizes and respects the confidential nature of the Services. No purported assignment of the Agreement shall relieve the Contractor from any obligation under the Agreement or impose any liability upon CMHC.*

#### **4.21. Closure of CMHC Offices or Suspension of Operations**

*Where CMHC premises become inaccessible due to evacuation or closure because of events or circumstances beyond the control of CMHC, where the health or safety of persons on the premises may be reasonably determined by CMHC, in its sole judgment, to be at risk, or where CMHC operations are suspended, payment to the Contractor may be suspended or modified. Where the Contractor provides satisfactory evidence to CMHC that the Contractor will continue to incur monetary obligations to others directly as a result of its undertakings under this Agreement and is unable to mitigate its losses due to such obligations, CMHC may continue payment in full, or at a reduced amount, or suspend payment completely.*

#### **4.22. Severability**

*If any part of the Agreement is determined to be unenforceable by a competent authority, it may be severed from the Agreement so as to preserve the intentions of the Parties to the extent possible.*

#### **4.23. Scope of Agreement**

*This Agreement contains all of the agreements of the Parties and no other representations or warranties, verbal or otherwise, exist between the Parties except those set out herein or attached as Specifications, Conditions and Addendum and signed by both Parties. In case of conflicts between the Contractor's documents and CMHC's documents, the latter shall govern.*

#### **4.24. Binding**

*This Agreement shall be binding upon the Parties, their heirs, executors, administrators, successors and assigns.*

## **Article 5.0 - Agreement Administration**

### **5.1 Contract Administrator**

*Each Party shall assign a contract administrator that will be responsible for overseeing the Agreement. The individuals named in section 5.2 are the initial agreement administrators.*

*The Parties shall notify the other in writing in the event that the contract administrator is changed. CMHC will notify the Contractor in writing of the names of any CMHC representatives who are authorized to assign jobs and approve payments with respect to the work carried out under this Agreement.*

### **5.2 Notices**

*All invoices and notices issued under the Agreement shall be in writing and shall be forwarded via mail, courier or e-mail:*

*To CMHC at the following address:*

#### **Canada Mortgage and Housing Corporation**

Name [Click here to enter text.](#)

Title [Click here to enter text.](#)

Room [Click here to enter text.](#)

700 Montreal Road

Ottawa, Ontario

K1A 0P7

Phone: [Click here to enter text.](#)

Fax: [Click here to enter text.](#)

Email: [Click here to enter text.](#)

*To the Contractor at the following address:*

**[Click here to enter text.](#)**

[Click here to enter text.](#)

[Click here to enter text.](#)

[Click here to enter text.](#)

Phone: [Click here to enter text.](#)

Fax: [Click here to enter text.](#)

E-mail: [Click here to enter text.](#)

## **Article 6.0 - Documents comprising the Agreement**

**6.1** *The documents which comprise the entire agreement between the Parties with respect to this matter consist of the following:*

- (a) This form of Agreement as executed [Click here to enter text.](#);*
- (b) CMHC's Request for Proposal dated [Click here to enter text.](#);*
- (c) The Contractor's submitted Proposal dated [Click here to enter text.](#); and*

*together with all written change notices issued by CMHC hereunder and such further specifications and documents as the parties may agree in writing.*

**6.2** *The documents comprising the Agreement are complementary and what is called for in any one shall be binding as if called for by all. The Agreement documents shall be interpreted as a whole and the intent of the whole shall govern. In the event of a conflict between them, the Agreement documents shall have precedence among themselves in the order as listed above.*

**IN WITNESS WHEREOF** this Agreement has been executed by duly authorized officers of the Parties as follows:

**THE CONTRACTOR**

**CANADA MORTGAGE AND HOUSING CORPORATION**

[Click here to enter text.](#)

[Click here to enter text.](#)

[Click here to enter text.](#)

[Click here to enter text.](#)

[Click here to enter text.](#)

**Date:** \_\_\_\_\_

**Date:** \_\_\_\_\_

## SCHEDULE "A"

### TERMS OF REFERENCE

1. **Statement of Work**
2. **Project Management**
3. **Schedule of Tasks and Allocation of Staff by Phases**



## **SCHEDULE "B"**

### **MANNER OF PAYMENT**

*If the Contractor is not in breach of any of its (his, her) obligations under this Agreement, the Contractor will be paid in accordance with the following schedule:*

*I. Upon the contractor having completed (work, e.g. "Phase I of the work as set out in Schedule "A") and upon submission and acceptance to the full satisfaction of CMHC of [Click here to enter text.](#) by [Click here to enter text.](#) \$[Click here to enter text.](#)*

## 7 SECTION 7 APPENDICES

### APPENDIX A

### MANDATORY

#### 7.1 Certificate of Submission

---

hereby:

Company Name

---

Procurement Business Number (PBN)

- I. agrees and understands that submission of a proposal constitutes acknowledgement that the proponent has read and, unless otherwise stated in the proponent's proposal, agrees to be bound by the terms and conditions in the draft Agreement in the event that the proponent is selected by CMHC to enter into a contract;
- II. agrees to comply with all of the draft Agreement MANDATORY clauses in an unaltered form as stated;
- III. offers to provide services and/or products to CMHC, as described in this proposal, on and if, as and when required basis, all in accordance with the Request for Proposal;
- IV. offers the terms as set out in this proposal, including any pricing proposal for a period of time as specified in section 2 of the RFP;
- V. certifies that, at the time of submitting this bid, is in full compliance with all tax statutes administered by all provincial, territorial and federal Ministries of Finance and that, in particular, all returns required to be filed under all provincial and federal tax statutes have been filed, and all taxes due and payable under those statutes have been paid or satisfactory arrangements for their payment have been made and maintained;
- VI. represents and warrants that in submitting the proposal or performing the Agreement, there is no actual or perceived conflict of interest;
- VII. represents and warrants that in preparing the proposal, there was no actual or perceived unfair advantage due to the receipt of information regarding the RFP that was not made available to other proponents;
- VIII. certifies that this proposal was independently arrived at, without collusion;
- IX. 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 Agreement or favourable treatment under an Agreement;
- X. authorizes CMHC to conduct such investigation as it deems appropriate to verify the contents of the proposal;
- XI. certifies, unless explicitly outlined in the proposal, that all pricing information is based on service provision which, at a minimum, fully meets all of the existing service standards as outlined in the Statement of Work;
- XII. (for sole proprietorships and partnerships) provide permission herewith to CMHC to undertake credit checks on the individuals listed below (names, signatures and home addresses of each must be provided).
- XIII. agrees that, in the event of acceptance of this proposal, it will enter Agreement negotiations in accordance with the RFP, and upon entry into an Agreement with CMHC, it will commit to providing the full scope of services identified in the Agreement.
- XIV. agrees that all responses and related materials become the property of CMHC, will not be returned and CMHC will not reimburse the proponent for any work related to, travel or materials supplied in the preparation of the RFP response.
- XV. agrees that it and any other persons for which it is responsible, who are to perform the work as stated in this RFP, at the request of CMHC will comply with security screening as deemed appropriate;

Signed this \_\_\_\_\_ day of \_\_\_\_\_, 2016 at \_\_\_\_\_, Canada.

**Corporations are not required to provide a corporate seal. The signature of one witness is required for the signature of each Owner/Signing Authority.**

**Corporation/Individual:**

\_\_\_\_\_  
*Signature of Signing Authority*

\_\_\_\_\_  
*Name and Title of Signing Authority*

*Declaration: I have the authority to bind the company.*

## APPENDIX B

### 7.2 Evaluation Table

EVALUATION CRITERIA	A	B	C
	WEIGHT 100 Total	POINTS 1 to 5	SCORE AxB
<p><b>Proponent Qualifications</b>  <i>The proposal will be evaluated on:</i></p> <p>1) <i>the full description of the firm;</i></p> <p style="margin-left: 20px;"><i>a. minimal detail provided: 1,0 pt</i></p> <p style="margin-left: 20px;"><i>b. some detail provided: 2,0 pts</i></p> <p style="margin-left: 20px;"><i>c. reasonable detail provided: 3 pts</i></p> <p style="margin-left: 20px;"><i>d. good level of detail provided: 4pts</i></p> <p style="margin-left: 20px;"><i>e. complete and extensive level of detail provided: 5pts</i></p> <p>2) <i>résumés for all personnel;</i></p> <p style="margin-left: 20px;"><i>a. a year or less on average, all experiences and studies combined: 1,0 pt</i></p> <p style="margin-left: 20px;"><i>b. 2 years on average, all experiences and studies combined: 2,0 pts</i></p> <p style="margin-left: 20px;"><i>c. 3 years on average, all experiences and studies combined: 3 pts</i></p> <p style="margin-left: 20px;"><i>d. 4 years on average, all experiences and studies combined: 4pts</i></p> <p style="margin-left: 20px;"><i>e. 5+ years on average, all experiences and studies combined: 5pts</i></p> <p>3) <i>provision of references;</i></p> <p style="margin-left: 20px;"><i>a. one or less project in similar field with good reference: 1,0 pt</i></p> <p style="margin-left: 20px;"><i>b. 2 projects in similar field with good reference: 2,0 pts</i></p> <p style="margin-left: 20px;"><i>c. 3 projects in similar field with good reference: 3 pts</i></p> <p style="margin-left: 20px;"><i>d. 4 projects in similar field with good reference: 4pts</i></p> <p style="margin-left: 20px;"><i>e. 5+ projects in similar field with good reference: 5pts</i></p> <p>4) <i>office location(s) and experience of personnel on site.</i></p> <p style="margin-left: 20px;"><i>a. minimal office location and personnel on site details provided: 1,0 pt</i></p> <p style="margin-left: 20px;"><i>b. some office location and personnel on site details provided: 2,0 pts</i></p> <p style="margin-left: 20px;"><i>c. reasonable office location and personnel on site details provided: 3 pts</i></p> <p style="margin-left: 20px;"><i>d. good level of office location and personnel on site details provided: 4pts</i></p> <p style="margin-left: 20px;"><i>e. complete and extensive level of office location and personnel on site details provided: 5pts</i></p>	20		

<p><b>Response to Statement of Work</b></p> <p>The proposal must demonstrate a clear understanding of project objectives and requirements. The Proponent must provide a detailed response to each item listed in section 3.0, demonstrating how they meet each requirement:</p> <p>1) Proposed methodology:</p> <ul style="list-style-type: none"> <li>a. minimal methodology details provided: 1,0 pt</li> <li>b. some methodology details provided: 2,0 pts</li> <li>c. reasonable methodology details provided: 3 pts</li> <li>d. good level of methodology details provided: 4pts</li> <li>e. complete and extensive level of methodology details provided: 5pts</li> </ul> <p>2) Anticipated Resources required for each phase</p> <ul style="list-style-type: none"> <li>a. minimal anticipated resources details provided: 1,0 pt</li> <li>b. some anticipated resources details provided: 2,0 pts</li> <li>c. reasonable anticipated resources details provided: 3 pts</li> <li>d. good level of anticipated resources details provided: 4pts</li> <li>e. complete and extensive level of anticipated resources details provided: 5pts</li> </ul> <p>3) Ability to complete the project within the time frame</p> <ul style="list-style-type: none"> <li>a. minimal demonstration of ability to complete the project within the time frame: 1,0 pt</li> <li>b. some demonstration of ability to complete the project within the time frame: 2,0 pts</li> <li>c. reasonable demonstration of ability to complete the project within the time frame: 3 pts</li> <li>d. good demonstration of ability to complete the project within the time frame: 4pts</li> <li>e. complete and extensive demonstration of ability to complete the project within the time frame: 5pts</li> </ul> <p>4) Bilingual capacity (French and English)</p> <ul style="list-style-type: none"> <li>a. capacity to conduct the survey in only one language, French or English: 1,0 pt</li> <li>b. capacity to conduct the survey both in French and English: 3 pts</li> <li>c. capacity to conduct the survey both in French and English and in one or more of these languages: Mandarin, Cantonese, Italian, Panjabi, Tagolog or Spanish: 5pts</li> </ul> <p>5) Project objectives</p> <ul style="list-style-type: none"> <li>a. minimal demonstration of objectives comprehension: 1,0 pt</li> <li>b. some demonstration of objectives comprehension: 2,0 pts</li> <li>c. reasonable demonstration of objectives comprehension: 3 pts</li> <li>d. good demonstration of objectives comprehension: 4pts</li> <li>e. complete and extensive demonstration of objectives comprehension: 5pts</li> </ul> <p>6) Current and emerging issues and anticipated difficulties</p>	40		
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<b>EVALUATION CRITERIA</b>	<b>A</b>	<b>B</b>	<b>C</b>
	<b>WEIGHT 100 Total</b>	<b>POINTS 1 to 5</b>	<b>SCORE AxB</b>
<ul style="list-style-type: none"> <li>a. <i>minimal details provided on current and emerging issues and anticipated difficulties: 1,0 pt</i></li> <li>b. <i>some details provided on current and emerging issues and anticipated difficulties: 2,0 pts</i></li> <li>c. <i>reasonable details provided on current and emerging issues and anticipated difficulties: 3 pts</i></li> <li>d. <i>good details provided on current and emerging issues and anticipated difficulties: 4pts</i></li> <li>e. <i>complete and extensive details provided on current and emerging issues and anticipated difficulties: 5pts</i></li> </ul>			

EVALUATION CRITERIA	A	B	C
	WEIGHT 100 Total	POINTS 1 to 5	SCORE AxB
<p><b>Project Management Plan</b></p> <p>1) Project management approach</p> <ul style="list-style-type: none"> <li>a) Minimal project management plan details provided: 1,0 pt</li> <li>b) some project management plan details provided: 2,0 pts</li> <li>c) reasonable project management plan details provided: 3 pts</li> <li>d) good level of project management plan details provided: 4pts</li> <li>e) complete and extensive level of detail provided: 5pts</li> </ul> <p>2) Quality control</p> <ul style="list-style-type: none"> <li>a) minimal quality control details provided: 1,0 pt</li> <li>b) some quality control details provided: 2,0 pt</li> <li>c) reasonable quality control details provided: 3 pts</li> <li>d) good level of quality control details provided: 4pts</li> <li>e) complete and extensive level of quality control details provided: 5pt</li> </ul> <p>3) Status reporting:</p> <ul style="list-style-type: none"> <li>a) minimal status reporting details provided: 1,0 pt</li> <li>b) some status reporting details provided: 2,0 pts</li> <li>c) reasonable status reporting details provided: 3 pts</li> <li>d) good level of status reporting details provided: 4pts</li> <li>e) complete and extensive level of status reporting details provided: 5pts</li> </ul> <p>4) Work Schedule:</p> <ul style="list-style-type: none"> <li>a) minimal work schedule correspond to CMHC plan: 1,0 pt</li> <li>b) some parts of work schedule correspond to CMHC plan: 2,0 pts</li> <li>c) reasonable portion of work schedule correspond to CMHC plan: 3 pts</li> <li>d) majority of parts of work schedule correspond to CMHC plan: 4pts</li> <li>e) all parts of working schedule correspond to CMHC plan: 5pts</li> </ul> <p>5) Interface with CMHC:</p> <ul style="list-style-type: none"> <li>a) minimal interface with CMHC details provided: 1,0 pt</li> <li>b) some interface with CMHC details provided: 2,0 pts</li> <li>c) reasonable interface with CMHC details provided: 3 pts</li> <li>d) good level of interface with CMHC details provided: 4pts</li> <li>e) complete and extensive level of interface with CMHC details provided: 5pts</li> </ul> <p>6) Continuous Improvement:</p> <ul style="list-style-type: none"> <li>a) minimal continuous improvement details provided: 1,0 pt</li> <li>b) some continuous improvement details provided: 2,0 pts</li> <li>c) reasonable continuous improvement details provided: 3 pts</li> <li>d) good level of continuous improvement details provided: 4pts</li> <li>e) complete and extensive level of continuous improvement details provided: 5pts</li> </ul>	40		

<b>EVALUATION CRITERIA</b>	<b>A</b>	<b>B</b>	<b>C</b>
	<b>WEIGHT 100 Total</b>	<b>POINTS 1 to 5</b>	<b>SCORE AxB</b>
<b>Pricing Proposal</b> <i>CMHC will allot the highest points to the lowest priced proposal and pro-rate all other priced proposals by the percentage they are higher from the lowest priced proposal.</i>	10		
<b>TOTALS</b>	100		



## APPENDIX C

### 7.3 Mandatory Compliance Checklist

- |   |                              |
|---|------------------------------|
| <input type="checkbox"/> <i>Submission Deadline</i>           | <i>Section 2.3.1</i>         |
| <input type="checkbox"/> <i>Offering Period</i>               | <i>Section 2.7</i>           |
| <input type="checkbox"/> <i>Proponent's Qualifications</i>    | <i>Section 4.6</i>           |
| <input type="checkbox"/> <i>Response to Statement of Work</i> | <i>Section 4.7</i>           |
| <input type="checkbox"/> <i>Project Management Plan</i>       | <i>Section 4.8</i>           |
| <input type="checkbox"/> <i>Financial Information</i>         | <i>Section 4.9</i>           |
| <input type="checkbox"/> <i>Pricing Proposal</i>              | <i>Section 4.11</i>          |
| <input type="checkbox"/> <i>Proposed Contract</i>             | <i>Section 6</i>             |
| <input type="checkbox"/> <i>7.1 Certificate of Submission</i> | <i>Section 7, Appendix A</i> |

**APPENDIX D**

**7.4 Questionnaire**

**Household Rent Survey 2016  
Questionnaire**

# Table of Contents

**PRE-QUESTIONS.....**

**HOUSEHOLD RENT SURVEY (HRS).....**

**SURVEY END STATEMENTS.....**

# Pre-Questions

*Int1.* Hello. Bonjour. My name is \_\_\_\_\_ and I am calling from **[Survey Company Name]** on behalf of Canada Mortgage & Housing Corporation, sometimes referred to as CMHC. We are conducting a nationwide survey on the Canadian housing market. This survey will require only a few minutes of your time. Would you participate in the survey?

- <sub>1</sub> Yes
- <sub>2</sub> No, call back later
- <sub>3</sub> No, refusal (Go to End refusal)
- <sub>4</sub> Respondent speaks French, say (in the appropriate language): **We also conduct this survey in** (pick appropriate language) **French. Someone will call you back in a couple of minutes** (code appropriately).

*INTERVIEWER NOTE:* Only if asked, state “The interview may take as few as 3-4 minutes or, for a few people, it may take up to 9-10 minutes depending on which questions are asked.”

*Int2.* Are you 18 years old or older?

- <sub>1</sub> Yes (Go to Int4.)
- <sub>2</sub> No

*Int3.* Can I please speak with someone who is 18 years old or older?

- <sub>1</sub> Yes (Go to Int1.)
- <sub>2</sub> No (Go to End Under 18.)

*Int4.* Does this phone number belong to a business?

- <sub>1</sub> Yes (Go to End Not Qualify.)
- <sub>2</sub> No
- <sub>99</sub> Don't know / Refused

*INTERVIEWER NOTE:* Read the definitions if necessary.

**Int5. Does this phone number belong to a nursing home, health care facility or retirement home?**

- <sub>1</sub> Yes (Go to End Not Qualify.)
- <sub>2</sub> No
- <sub>99</sub> Don't know / Refused

*INTERVIEWER NOTE:* Read the definitions if necessary.

**Int6. Does this phone number belong to a hotel, vacation home or rooming house?**

- <sub>1</sub> Yes (Go to End Not Qualify.)
- <sub>2</sub> No
- <sub>99</sub> Don't know / Refused

*INTERVIEWER NOTE:* Read the definitions if necessary.

#### DEFINITIONS

**Business** - Also known as an enterprise or a firm, is an organization involved in the trade of goods, services, or both to consumers.

**Nursing Home** – A private institution providing residential accommodations with health care, especially for elderly people.

**Health Care Facility** – Refers to any location where health care is provided. Examples of health care facilities include: hospitals, nursing homes, long-term care facilities, etc.

**Retirement Home** – A multi-residence housing facility intended for senior citizens. Examples of residences for senior citizens include: retirement home, retirement community, seniors' home, etc.

**Hotel** – An establishment providing accommodations, meals, and other services for travelers and tourists.

**Vacation Home** – A dwelling other than the owner's primary residence that is used for vacations or recreational purposes.

**Rooming House** – Also known as a lodging house, it provides residents with a private room and access to shared common areas. The room does not have both a private kitchen and bathroom (although it may have one or the other).

**All information you provide through this survey is kept strictly confidential and only used by CMHC to generate statistics and data sets about the Canadian housing market that do not allow for the identification of individuals or households, businesses or buildings. Please note that this call may be recorded for quality assurance.**

**Q1. Do you or anyone living with you own the housing unit?**

- <sub>1</sub> Yes (Go to End Owner.)
- <sub>2</sub> No
- <sub>99</sub> Don't know / Refused (Go to End Owner.)

**Q2. To confirm, you are currently renting this housing unit?**

- <sub>1</sub> Yes (Continue on to HRS – Q3.)
- <sub>2</sub> No (Go to End Owner.)
- <sub>99</sub> Don't know / Refused (Go to End Owner.)

## Household Rent Survey (HRS)

**Q3. Secondary suites are sometimes part of an existing dwelling or built as a separate building on the same lot. Examples of secondary suites include: basement apartments, in-law suites, second floor suites, garden suites, laneway houses, carriage houses, coach houses, etc. Do you live in a secondary suite?**

- <sub>1</sub> Yes (Go to Section B – Q5a.)
- <sub>2</sub> No (Go to Section A – Q4a.)
- <sub>99</sub> Don't know / Refused

*INTERVIEWER NOTE:* An Accessory Suite is a self-contained dwelling that is accessory in use to the principal dwelling and located either in the primary dwelling or in an accessory building on the same lot as the primary dwelling. An accessory suite is required to have its own entrance, kitchen, bathroom and living area. Common terms used for secondary suite: basement apartment, basement suite, granny suite, in-law suite, second floor suite, garden suite, garage suite, laneway house, carriage house, and coach house.

### *Section A - Not a Secondary Suite*

**Q4a. Is your housing unit part of a condominium (or strata) development?**

- <sub>1</sub> Yes
- <sub>2</sub> No
- <sub>99</sub> Don't know / Refused

*PROGRAMMER NOTE:* The text “or strata” should only be included in the question for Vancouver, Victoria, Abbotsford and Kelowna.

*INTERVIEWER NOTE:* A condominium or strata development is a residential complex in which dwellings are owned individually while land and common elements are held in joint ownership with others.

Q4b. If Q4a = 2 or 99 then the question is: **Of the following, which dwelling type do you live in?**

If Q4a = 1 then the question is: **Of the following, which dwelling type does your Condo belong to?**

- 1** **Single-detached house** (Examples: Bungalow, Hi Ranch, 2 Storey, 3 Storey, Split Level) (Go to Section C - Q6.)
- 2** **Row house or townhouse** (Three or more houses joined side by side.) (Go to Section C - Q6.)
- 3** **Semi-detached house or double** (Two houses attached side by side.) (Go to Section C - Q6.)
- 4** **Duplex** (Two housing units located one above the other.) (Go to Section C - Q6.)
- 5** **Apartment** (Examples: High Rise, Low Rise, Stacked Row)
- 6** Other: specify \_\_\_\_\_
- 99** Don't know / Refused (Go to End.)

**INTERVIEWER NOTE:** Read the dwelling type definitions if necessary. CONDO is not a valid response. Interviewer must probe respondent for one of the dwelling types above.

#### DEFINITION OF DWELLING TYPES

**1. Single-detached house** – A single dwelling refers to a building which is completely separate on all sides from any other dwelling or structure. A single-detached house has open space on all sides, and has no dwellings either above it or below it. Examples: Bungalow, Hi Ranch, 2 Storey, 3 Storey, Split Level.

**2. Row house or townhouse** – A dwelling unit attached to two or more similar units so that the resulting row structure contains three or more units. Linked house is a type of row house.

**3. Semi-detached house or double** – Refers to two ground oriented dwelling units located side-by-side. Adjoining no other structure and separated by a common or wall extending from ground to roof.

**4. Duplex** – One of two dwellings, located one above the other, may or may not be attached to other dwellings or buildings.

**5. Apartment** – An “Apartment” unit is a self-contained dwelling unit situated above or below one or more units, in a high-rise apartment building or in a building with fewer than 5 stories attached to other dwelling units, commercial units, or other non-residential space. Examples: High Rise, Low Rise, Stacked Row.

Q4c. **Is your rental unit self-contained; meaning does have its own kitchen, bathroom and separate entrance?**

- 1** Yes
- 2** No (Go to End.)
- 99** Don't know / Refused (Go to End.)



*INTERVIEWER NOTE:* Mark “Yes” only if the dwelling unit has all three.

**Q4d. Including your own unit, are there 3 or more self-contained units in the building?**

- <sub>1</sub> Yes (Go to End.)
- <sub>2</sub> No
- <sub>99</sub> Don’t know / Refused (Go to End.)

*INTERVIEWER NOTE:* “Self-contained units” include units with its own kitchen, bathroom and separate entrance.

**Q4e. Approximately how many floors of residential units does your building have?**

- \_\_\_\_\_ floor(s) (Go to Section C - Q6.)
- <sub>99</sub> Don’t know / Refused (Go to Section C - Q6.)

*Section B - Secondary Suite*

**Q5a. Is your housing unit part of a condominium (or strata) development?**

- <sub>1</sub> Yes
- <sub>2</sub> No
- <sub>99</sub> Don’t know / Refused

*PROGRAMMER NOTE:* The text “or strata” should only be included in the question for Vancouver, Victoria, Abbotsford and Kelowna.

*INTERVIEWER NOTE:* A condominium or strata development is a residential complex in which dwellings are owned individually while land and common elements are held in joint ownership with others.

**Q5b.** If Q5a = 2 or 99 then the question is: **Of the following, which building type does your secondary suite belong to?**

If Q5a = 1 then the question is: **Of the following, which type of condominium building does your secondary suite belong to?**

- 1** **Single-detached house** (Examples: Bungalow, Hi Ranch, 2 Storey, 3 Storey, Split Level)
- 2** **Row house or townhouse** (Three or more houses joined side by side.)
- 3** **Semi-detached house or double** (Two houses attached side by side.)
- 4** **Duplex** (Two housing units located one above the other.)
- 5** **Apartment** (Examples: High Rise, Low Rise, Stacked Row)
- 6** **Other: specify \_\_\_\_\_**
- 99** **Don't know / Refused (Go to End.)**

**INTERVIEWER NOTE:** Do not read the Apartment dwelling type for this question. Read the building structure definitions if necessary. CONDO is not a valid response. Interviewer must probe respondent for one of the dwelling types above.

#### DEFINITION OF DWELLING TYPES

**1. Single-detached house** – A single dwelling refers to a building which is completely separate on all sides from any other dwelling or structure. A single-detached house has open space on all sides, and has no dwellings either above it or below it. Examples: Bungalow, Hi Ranch, 2 Storey, 3 Storey, Split Level.

**2. Row house or townhouse** – A dwelling unit attached to two or more similar units so that the resulting row structure contains three or more units. Linked house is a type of row house.

**3. Semi-detached house or double** – Refers to two ground oriented dwelling units located side-by-side. Adjoining no other structure and separated by a common or wall extending from ground to roof.

**4. Duplex** – One of two dwellings, located one above the other, may or may not be attached to other dwellings or buildings.

**5. Apartment** – An “Apartment” unit is a self-contained dwelling unit situated above or below one or more units, in a high-rise apartment building or in a building with fewer than 5 stories attached to other dwelling units, commercial units, or other non-residential space. Examples: High Rise, Low Rise, Stacked Row.

**Q5c.** **Is your rental unit self-contained; meaning does have its own kitchen, bathroom and separate entrance?**

- 1** **Yes (If Q5b = 1-4 then go to Section C - Q6. Otherwise go to Q5d.)**
- 2** **No (Go to End.)**
- 99** **Don't know / Refused (Go to End.)**

*INTERVIEWER NOTE:* Mark “Yes” only if the dwelling unit has all three.

**Q5d. Including your own unit, are there 3 or more self-contained units in the building?**

- <sub>1</sub> Yes (Go to End.)
- <sub>2</sub> No
- <sub>99</sub> Don’t know / Refused (Go to End.)

*INTERVIEWER NOTE:* “Self-contained units” include units with its own kitchen, bathroom and separate entrance.

**Q5e. Approximately how many floors of residential units does your building have?**

- \_\_\_\_\_ floor(s) (Go to Section C – Q6.)
- <sub>99</sub> Don’t know / Refused (Go to Section C - Q6.)

### Section C

**Q6. How many bedrooms are in your housing unit?**

\_\_\_\_\_ bedrooms (If greater than 4, go to Q6a. Otherwise, go to Q7.)

*INTERVIEWER NOTE:* Bachelors or studio units have 0 (zero) bedrooms.

**Q6a. To confirm, you have (amount from Q6) bedrooms.**

- <sub>1</sub> Yes
- <sub>2</sub> No, record \_\_\_\_\_ bedroom(s)

### CONFIDENTIALITY REMINDER:

**Just a reminder that all information you provide through this survey is kept strictly confidential and only used by CMHC to generate statistics and data sets about the Canadian housing market that do not allow for the identification of individuals or households, businesses or buildings.**

**Q7. What is the total monthly rent for this housing unit?**

\$ \_\_\_\_\_ per month (If less than \$300 or greater than \$4000, go to Q7a. Otherwise go to Q8.)

<sub>99</sub> Don't know / Refused (Go to Q10.)

*INTERVIEWER NOTE: Total monthly rent includes rent from ALL occupants in the housing unit.*

**Q7a. To confirm, to total monthly rent monthly rent is (amount from Q7) dollars?**

<sub>1</sub> Yes

<sub>2</sub> No - \$ \_\_\_\_\_ per month

**Q8. Is your housing unit's monthly rent reduced due to government subsidy or for other reasons?**

<sub>1</sub> Yes (Go to Q10.)

<sub>2</sub> No

<sub>99</sub> Don't know / Refused

*INTERVIEWER NOTE: Reduced rent can be due to government subsidized housing which includes federal, provincial and municipal programs as well as other reasons such as services to landlord and company housing.*

**Q9. Are you renting this housing unit from a relative or family member?**

<sub>1</sub> Yes

<sub>2</sub> No

<sub>99</sub> Don't know / Refused

**Q10. Does the owner of this unit live outside Canada?**

<sub>1</sub> Yes

<sub>2</sub> No

<sub>99</sub> Don't know / Refused

**Q11. Are you renting your unit from a property management firm and not an individual?**

- <sub>1</sub> Yes
- <sub>2</sub> No
- <sub>99</sub> Don't know / Refused

**DEMOGRAPHIC REMINDER**

To ensure your response is properly represented in the survey, we will ask some demographic questions.

**Q12. What is your postal code?**

\_\_\_\_\_ (Go to Q14.)

- <sub>99</sub> Don't know / Refused

**Q13. What municipality do you live in?**

- Municipality List (Refer to Appendix A for municipality lists by CMA.)
- Other: specify \_\_\_\_\_
- <sub>99</sub> Don't know / Refused

**Q14. Of the following, which age category do you belong to?**

- <sub>1</sub> 18 to 24
- <sub>2</sub> 25 to 29
- <sub>3</sub> 30 to 34
- <sub>4</sub> 35 to 39
- <sub>5</sub> 40 to 44
- <sub>6</sub> 45 to 49
- <sub>7</sub> 50 to 54
- <sub>8</sub> 55 to 59
- <sub>9</sub> 60 to 64
- <sub>10</sub> 65 to 69
- <sub>11</sub> 70 or greater
- <sub>99</sub> Refused

Go to End.

## Survey End Statements

### **End Refusal**

*We respect your decision. Thank you for your time.*

### **End Under 18**

*Thank you, however, for the purposes of this survey, CMHC is only interested in talking with someone who is 18 years of age or older. We'll call back later. Have a great day.*

### **End Not Qualify**

*[Survey Company Name] and CMHC would like to thank you for your participation; however, you do not qualify for the survey. Thanks again for taking the time to participate. Have a great day.*

### **End Owner**

*[Survey Company Name] and CMHC would like to thank you for your participation; however, we are trying to gather data from households who rent their dwelling. Thanks again for taking the time to participate. Have a great day.*

### **End**

*Those are all the questions I have for you today. [Survey Company Name] and CMHC would like to thank you for your participation. Have a great day.*