

Schedule A

Statement of Work

Table of Contents

1	Survey Conduct	3
2	Delivery Organization	5
3	Communications	11
4	Management Interfaces.....	11
5	Reports.....	12
6	Quality Management	13
7	Subcontractor Management.....	14
8	Business Continuity and Disaster Recovery Planning	14
9	Records Management	16
10	Transition.....	16
11	Transition Out – Hand Back	18
12	Reference Tables	20

1 Survey Conduct

The proponent shall assist in the conduct of the CMHC surveys by providing the personnel required to conduct the Starts and Completions Survey (SCS), Market Absorption Survey (MAS), Rental Market Survey (RMS), Condo Vacancy Survey (CVS) and Seniors’ Housing Survey (SHS).

Element #	Element	Service Requirement
Proponent Requirements		
1.1	Support Survey Conduct	<p>The proponent shall support the conduct of the SCS, MAS, RMS, CVS and SHS by providing the personnel required to perform the enumeration, interviewing and data entry services beginning January 1st, 2017.</p> <p>The job descriptions associated with the enumeration, interviewing and data entry services during the survey conduct are identified in Schedule B: <i>Job Descriptions</i>.</p> <p>The survey questionnaires that will be utilized during the data collection for the surveys are located in Schedule C: <i>Survey Questionnaires</i>. These questionnaires are revised by CMHC on a yearly basis.</p> <p>The proponent shall follow the Staffing Plan as described in Section 2.3 of this Schedule.</p>
1.2	Location for Services	<p>The proponent shall provide the personnel required to perform enumeration services for SCS/MAS throughout Canada beginning January 1st, 2017. Appendix D outlines the locations for which the enumerator will be providing services.</p> <p>The proponent shall provide the personnel required to perform the interviewing and data entry services for the RMS, CVS and SHS at the CMHC regional offices. The regional office locations are:</p> <ul style="list-style-type: none"> • Halifax, • Montreal, • Ottawa, • Toronto, • Calgary, and • Vancouver.
1.3	Services Schedule	The proponent shall follow the schedule outlined in Table 4 Section 12 for the provision of services in 2017.
1.4	Enumerator Email	The proponent shall provide an email address to the enumerators to assist them in the survey conduct for SCS/MAS.

1.5	Survey Procedures	The proponent personnel performing the enumeration, interviewing and data entry services shall follow the survey procedures and practices outlined by CMHC during the CMHC survey training sessions and in the CMHC survey manuals.
CMHC Requirements		
1.6	CMHC Survey Management	<p>CMHC shall be responsible for the management of the surveys, this includes:</p> <ul style="list-style-type: none"> • Survey budget; • Staff roles and job descriptions as described in Section 2.16 of this Schedule; • Staffing numbers and location of work Section 2.17 of this Schedule; • Yearly expected hours of work as described in Section 2.18 of this Schedule; • Yearly expected kilometres traveled as described in Section 2.19 of this Schedule; • Hardware, GPS, cell phone, etc.; • Survey scheduling; • Survey applications; • Survey questionnaires; • Survey policies and procedures; and • Overall survey conduct.
1.7	CMHC Survey Supervision Related to Survey Operation	<p>CMHC will be responsible for the supervision of the enumerators, interviewers and data entry clerks while they are conducting the surveys. The CMHC supervisory duties include:</p> <ul style="list-style-type: none"> • Scheduling; • Assigning work tasks; • Monitoring survey data quality; and • Monitoring enumerator travel and hours in order to validate mileage and time claims as well as monitor the efficiency of the proponent personnel by comparing their data with pre-defined standards and thresholds for each survey.
1.8	Survey Training	CMHC will be responsible for the training of the enumerators, interviewers and data entry clerks relating to the conduct of the surveys.
1.9	Survey Conduct Cost	<p>CMHC will be responsible for the cost associated with these items relating to the survey conduct.</p> <p>SCS/MAS</p> <ul style="list-style-type: none"> • Shipment of the survey questionnaires • CMHC GPS equipment (provided to select proponent personnel) • Cell phones (provided to select proponent personnel)

		<ul style="list-style-type: none"> • Training • Business Cards • Identification Badge <p>RMS/CVS/SHS</p> <ul style="list-style-type: none"> • Shipment of the survey questionnaires • Hardware* (computer, phone) • Office supplies* (ex. pens, paper, etc.) • Telecommunication (phone services) • Facilities for conducting the surveys* • Training (hours, transportation, meals, incidentals, lodging, kilometres, etc.) <p>*Note: Provided onsite at CMHC regional offices.</p>
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2 Delivery Organization

The proponent shall provide an organization that is fully capable of meeting and delivering the requirements of the services in an effective, professional manner that is consistent with Good Industry Practices. Continuity of the proponent’s service delivery organization is paramount to successful delivery and continuous improvement of the services, therefore a crucial objective is to ensure minimal and non-disruptive turnover of the staff.

Element #	Element	Service Requirement
Proponent Requirements		
2.1	Provision of Resources	The proponent shall have an appropriate number of human resources to perform all of the services contained in the Agreement.
2.2	Initial Staffing	<p>The proponent shall make reasonable commercial efforts to hire the resources sufficiently in advance of the start date to ensure a smooth transition and no later than the start date. CMHC shall ensure that all proponent personnel for the enumeration, interviewing and data entry services are sufficiently trained to conduct the surveys.</p> <p>The proponent is encouraged to interview and consider the current CMHC employees for performing the services. Ideally, the proponent shall hire ALL the current CMHC employees performing the services. The current CMHC employees are very valuable due to their many years of experience conducting our surveys. The continued employment of the CMHC employees to perform the services would lead to a smoother transition for the outsourcing of these services. The proponent shall notify CMHC for the reason for NOT hiring current CMHC employees for performing the services in this Agreement.</p>

<p>2.3</p>	<p>Staffing Plan</p>	<p>The proponent shall submit the initial completed Staffing Plan, which shall be developed in collaboration with CMHC, to CMHC in accordance with the Transition Plan and shall update it annually and monthly thereafter. The Staffing Plan shall include, but not be limited to:</p> <ul style="list-style-type: none"> • Organization charts as described in Section 2.4 of this Schedule; • Staff roles and job descriptions as described in Section 2.12 of this Schedule; • Staffing numbers and location of work as described in Section 2.13 of this Schedule; • Staffing bilingual requirements as described in Section 2.15 of this Schedule; • Staffing Schedule as described in Table 4 Section 12 of this Schedule; • Plans and procedures for backup staff to fill vacancies and sickness, and similar situations; • CMHC interactions and relationships with the proponent personnel (points of interface); and • Salary scales (pay grades) and a description of the benefits plan; <p>In order to ensure continuity of the services, the proponent shall provide a back-up plan for personnel. In the event that a personnel has quit, for whatever reason, the proponent shall within one (1) business days of becoming aware that the position will be vacant notify CMHC and provide CMHC with a plan on how the service will continue to be maintained at an acceptable level. This shall be delivered in collaboration with CMHC where possible.</p>
<p>2.4</p>	<p>Organization Chart</p>	<p>The proponent shall provide an organization chart that includes the following information:</p> <ul style="list-style-type: none"> • Names and titles of all employees (whether they are the proponent or subcontractor staff); • Reporting relationships; • Identify the named resources dedicated 100% to the CMHC account; • Identify the percentage that any named resource is shared; • Location of work and where the proponent representatives are located; • Key subcontracted services and subcontractors; and • Identification of shared resources who perform the services as well as percentage dedicated. <p>Any changes are to be identified by the proponent as they occur. The proponent shall provide to CMHC an updated organization</p>

		<p>chart as it changes. At a minimum, the organization charts shall meet the following requirements:</p> <table border="1"> <tr> <td>Proponent Organization</td> <td>Visually depict the overall proponent’s organization as it relates to the services.</td> </tr> <tr> <td>Contract Management</td> <td>Visually depict the contract management organization as it relates to CMHC’s interfaces.</td> </tr> <tr> <td>Services Personnel</td> <td>Visually depict the services personnel.</td> </tr> </table>	Proponent Organization	Visually depict the overall proponent’s organization as it relates to the services.	Contract Management	Visually depict the contract management organization as it relates to CMHC’s interfaces.	Services Personnel	Visually depict the services personnel.
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Contract Management	Visually depict the contract management organization as it relates to CMHC’s interfaces.							
Services Personnel	Visually depict the services personnel.							
2.5	Labour Relations	The proponent shall be solely responsible for the control and management of its operations, employment practices and labour relations. For clarity, the proponent shall have the sole and exclusive control over its employees, employee-relations policies and policies relating to wages, hours of work and working conditions, and the sole and exclusive right to hire, transfer, suspend, lay-off, recall, promote, assign, discipline and discharge its employees. The proponent shall be responsible for the payment of all compensation, including wages, salary, benefits, expenses and severance, to all of its employees and other persons rendering services to the proponent as well as all withholding, remittance and reporting obligations relating to the payment of such amounts.						
2.6	Responsibility for Proponent Personnel	The proponent shall pay all employer payroll, employer health, income, withholding and other taxes, including Canada Pension Plan or provincial pension plan, employment insurance, and workers’ compensation or workplace safety and insurance in respect of each the proponent personnel as per the Canadian Labour Code (or Provincial equivalent). The proponent shall, and shall cause each subcontractor to, register itself and all persons engaged for service by it under applicable workers’ compensation legislation and to pay all applicable workers’ compensation premiums and maintain such workers’ compensation coverage throughout the term. The proponent further agrees to provide CMHC with evidence of all payments and registrations required by this section in form satisfactory to CMHC upon request by CMHC from time to time.						
2.7	Replacement of Employees	If CMHC, acting reasonably, determines that the continued assignment of any proponent representatives providing the services is not appropriate or in the best interests of CMHC, CMHC may deliver a written notice to the proponent requesting the replacement of such proponent representative. Forthwith after receipt of such a request, the proponent shall investigate the matters stated in the request and discuss its findings with CMHC within one (1) business day. If CMHC, acting reasonably, still requests the replacement of such proponent representative, the proponent shall replace, or cause to be replaced, such proponent representative with another of suitable ability, experience and qualifications reasonably acceptable to CMHC. Nothing in this						

		Section shall be deemed to give CMHC the right to require the proponent to terminate the employment of any proponent representative or to suggest that any proponent representative is an employee of CMHC. Instead, this Section is intended only to give CMHC the right to request that the proponent discontinue using such proponent representative in connection with the delivery and performance of the services.																										
2.8	Clearance Security Requirements	<p>The proponent shall ensure that all proponent personnel and subcontractor personnel achieve and maintain the required security clearances and background check no later than start date.</p> <p>The enumerators, interviewers and data entry clerks must all obtain and maintain a security clearance level of Reliability Status. The proponent will be responsible to liaise with CMHC’s Security Division for this matter. CMHC’s survey staff should not be involved (or only minimally) for the security clearance process.</p>																										
2.9	Time and Travel System	<p>The proponent shall have a system for recording the time and travel of the proponent’s personnel for delivery of the services. The system for recording the time and travel must be bilingual and be able to record:</p> <ol style="list-style-type: none"> i. Kilometres traveled, ii. Hours worked per day, iii. Province, iv. CMHC Met Code (see Appendix D), v. Survey, and vi. Activity (ex. research, field enumeration, home enumeration, interviewing, data entry, training, etc.) <p>The system used for time and travel reporting shall be in operation by the proponent, no later than the start date.</p>																										
2.10	Time and Travel Report	<p>The proponent shall provide to CMHC on a monthly basis a time and travel report. The time and travel report cover a <u>calendar month</u> and shall include the following tables.</p> <p>Table 1. Summary by Employee</p> <table border="1"> <thead> <tr> <th>Date</th> <th>Name of Employee</th> <th>Survey</th> <th>Position</th> <th>Activity</th> <th>CMHC Met Code</th> <th>Province</th> <th>Hours</th> <th>Kilometres</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <p>Note: CMHC Met code is a numeric value assigned by CMHC for the centres in the Starts and Completions Survey (see Appendix D).</p> <p>Table 2. All Costs by Position and Survey</p> <table border="1"> <thead> <tr> <th>Survey</th> <th>Enumerator</th> <th>Interviewer</th> <th>Data Entry Clerk</th> </tr> </thead> <tbody> <tr> <td>SCS/MAS</td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Date	Name of Employee	Survey	Position	Activity	CMHC Met Code	Province	Hours	Kilometres										Survey	Enumerator	Interviewer	Data Entry Clerk	SCS/MAS			
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2.11	Time and Travel Approval	The proponent shall submit to CMHC the number of kilometres and hours worked for all the proponent employees providing the enumeration, interviewing and data entry services on a weekly basis for CMHC approval. The proponent may NOT pay the proponent employee before the time and kilometres have been approved by CMHC.																																																																				
2.12	Salary Benchmarking	The proponent shall provide to CMHC on an annual basis a salary benchmarking report and confirmation that salaries are within 5% of the benchmark.																																																																				
2.13	Service Contract	<p>The Service Contract shall be developed in collaboration with CMHC for the proponent personnel providing the services. The service contract shall include but not limited to:</p> <ul style="list-style-type: none"> • Staff role and job description, • Survey training, • Reporting relationship, • Maximum number of hours per 2 weeks, • Scheduling, • Work tasks, • Automobile insurance requirements, • Security requirement, • Confidentiality of information, • Oath of fidelity and secrecy, • Code of conduct, • Entitlement to work in Canada, and • Traffic and parking violations. 																																																																				
2.14	Overtime	The proponent personnel shall not work greater than 75 hours of work in a 2 week period without formal approval from CMHC.																																																																				
2.15	Bilingual Personnel	The proponent shall provide bilingual proponent personnel to perform the enumeration, interviewing and data entry services as required by CMHC.																																																																				

CMHC Requirements		
2.16	Staff Roles and Job Descriptions	<p>CMHC shall provide and update as necessary, a job description for the enumeration, interviewing and data entry positions. Job descriptions must include at least the following information:</p> <ul style="list-style-type: none"> • Title and position requirements; • Reporting relationships (upwards and downwards); • Scope of responsibilities; and • Specific duties and tasks.
2.17	Staffing Numbers and Location of Work	CMHC shall provide and update as necessary, the staffing numbers and location of work for the enumeration, interviewing and data entry positions.
2.18	Hours of Work	<p>CMHC will provide on a yearly basis a forecast for the number of hours of work 3-6 months prior to the next calendar year.</p> <p>The ranges for the expected number of hours of work by job title and region for 2016 is located in Table 5 Section 12. Please note that the differences in the hours of work by region are due to different factors (ex. composition of the housing market, differences in provincial/municipal policies, etc.) that are out of CMHC's control.</p>
2.19	Kilometres Travelled	<p>CMHC will provide on a yearly basis a forecast for the number of kilometres travelled 3-6 months prior to the next calendar year.</p> <p>The ranges for the expected number of kilometres travelled by job title and region for 2016 is located in Table 6 Section 12. Please note that the differences in the kilometres travelled by region are due to different factors (ex. composition of the housing market, differences in provincial/municipal policies, etc.) that are out of CMHC's control.</p>
2.20	Staffing Schedule	CMHC shall provide and update as necessary, the staffing schedule for the surveys (see Table 4 Section 12).
2.21	Final Selection of Personnel	<p>In some occasions, CMHC shall be involved in the final stages of the hiring process for the candidates performing the enumeration services for SCS/MAS in this Agreement.</p> <p>The proponent shall provide CMHC the resumes of the top candidates. CMHC in collaboration with the proponent shall decide on which individuals will move on to the interview stage of the hiring process. CMHC shall be present for the candidate interviews. The proponent in collaboration with CMHC shall decide on the candidate who will win the competition.</p>

3 Communications

The proponent shall ensure that there is effective and efficient communications between itself and CMHC. The proponent shall closely coordinate activities with CMHC and notify CMHC of issues or matters that could impact the delivery of the CMHC surveys. The proponent shall do this by providing well-understood channels of communication and well-developed protocols for communicating in all possible situations.

Element #	Element	Requirement
3.1	Day-to-Day Communications	The proponent’s employees shall communicate with CMHC, on an as required basis, in order to ensure that the services are provided in a manner that does not disrupt the survey operations.
3.2	Communication Protocol Development and Updates	The proponent shall submit the initial completed Communication Plan, which shall be developed in collaboration with CMHC, to CMHC in accordance with the Transition Plan. Thereafter, the plan shall be updated and submitted to CMHC no later than twenty-four (24) hours after a change to its content.
3.3	Communication Response Requirement	The proponent shall provide any and all necessary information to enable CMHC to respond to information requests or develop communications required by CMHC. The proponent shall make best efforts to provide the information in the shortest possible timeframe, taking into consideration that the request will generally be of an urgent nature.
3.4	Bilingual Communication	All communication with the proponent’s personnel for the conduct of the enumeration, interviewing and data entry services in the Agreement as well as with CMHC personnel shall be available in both English and French.
3.5	Bilingual Documentation	The proponent shall ensure that all documentation (including time and travel forms) that are posted or distributed is available in both English and French.
3.6	Bilingual Applications	The proponent must provide bilingual applications (ex. time and travel recording) for the proponent’s personnel for the conduct of the services in the Agreement.

4 Management Interfaces

The proponent shall maintain effective and efficient interfaces between the proponent and CMHC. The objective is to develop an excellent working environment which leads to the successful delivery of the services.

Element #	Element	Requirement
Proponent Requirements		

4.1	Participate in ad hoc Meetings	The proponent shall organize, hold and follow-up on ad hoc meeting requests by CMHC to present reports, summarize activity, present future plans and upcoming changes that may impact the day-to-day operations of the services and discuss performance matters and results and any related corrective plans.
4.2	Meeting Requirements	The proponent shall provide appropriate and duly qualified management representatives at all meetings as required by CMHC.
CMHC Requirements		
4.3	Year End Post-Mortem	CMHC shall organize a year end post-mortem meeting to review the conduct of the services in the Agreement.

5 Reports

Reporting serves as an effective communication tool with CMHC as well as providing important and necessary information. The objective is for the proponent to provide accurate, complete and timely reports.

Element #	Element	Requirement
5.1	Report Requirements	The proponent shall prepare and submit all of the reports listed in Schedule E: <i>Reports</i> in a format that is approved in writing by CMHC. The proponent shall ensure that all reports be available in softcopy. During the transition period and during the term, CMHC shall have the right to request changes to reports, additions or deletions of reports at its sole and absolute discretion. The proponent shall modify the reports as requested at no cost to CMHC, unless the change requires significant customization.
5.2	Reporting Content and Format	The proponent shall provide CMHC with sample reports and sample data formats and test data in accordance with the Transition Plan or ten (10) days prior to the first issuance of each report as the case may be. CMHC shall review the format and content and provide comments on adjustments or revisions that CMHC deems necessary. The proponent shall submit all reports and data formats to CMHC for written approval in advance.
5.3	Changes to Report Requirements	The proponent shall, from time-to-time, add new reports or modify or change reports and/or data, distribution, format, and other similar matters as required or requested by CMHC due to emerging or changing requirements.
5.4	Timeliness, Quality and Completeness of Reporting	The proponent shall provide all information requested by CMHC in a timely manner and shall ensure that the information provided is accurate and complete. The proponent shall ensure and warrant the accuracy and

		completeness of all information and data, in terms of content, format and submission schedule through quality control and quality assurance of all data.
5.5	Laws and Regulations Compliance	The proponent shall prepare and submit reports on any compliance notices to the CMHC Relationship Manager with regards to breaches or non-conformances with any Laws and Regulations no later than two (2) hours after discovery or as otherwise agreed in writing by CMHC. The proponent shall provide a report no later than twenty-four (24) hours after the initial report on steps taken to that point, communication with the applicable legislative body, where appropriate, and action plans, including resources and timeframes, to rectify the non-conformity.
5.6	Ad Hoc Reporting	It is acknowledged that CMHC may, from time to time, have ad hoc requests for information and data which are expected to be fulfilled by the current staffing levels. The proponent shall provide all ad hoc reports requested by CMHC within five (5) business days or such other time as is reasonable agreed to by CMHC to reflect the complexity of the reporting request.

6 Quality Management

CMHC will be responsible for the quality management for the conduct of the surveys as well as monitoring the travel and hours claimed by the proponent personnel for the enumeration, interviewing and data entry services.

Element #	Element	Requirement
6.1	Survey Conduct	CMHC will be responsible for the quality management for the conduct of the surveys (ex, data quality, training, professionalism, etc.).
6.2	Travel and Hours	CMHC will be responsible for monitoring the travel and hours that are claimed as well as monitor the efficiency of the proponent personnel by comparing their data with pre-defined standards and thresholds for each survey.
6.3	Performance Audits	CMHC may, in its sole discretion, conduct periodic audits of the services and the quality of performance of the services using its own forces or a third party consultant. When requested by CMHC, the proponent shall assist with the performance audit process on an as required basis at no additional cost to CMHC.

7 Subcontractor Management

The proponent is fully accountable under the Agreement for the services whether they are self-performed or subcontracted. The proponent is expected to select, manage and monitor the subcontractors in order to avoid disruption to the services and in a manner that achieves the statement of work.

Element #	Element	Requirement
7.1	Compliance and Requirements	Subcontractors and their employees who work on the CMHC’s account must review and accept the applicable policies and procedures that apply to their services.
7.2	Performance Audits	CMHC may, in its sole discretion, conduct periodic audits of the services and the quality of performance of the services using its own forces or a third party consultant. The proponent shall participate in and assist with the performance audit process on an as required basis at no additional cost to CMHC.
7.3	Provide Subcontractor List	The proponent shall upon request provide an up-to-date Subcontractor list to CMHC with the company name, names of individuals, validation of their security clearance status and other details that may be required by CMHC on an as required basis.
7.4	Sign-in Required	All subcontractor employees shall be required to sign-in and out of the CMHC properties.

8 Business Continuity and Disaster Recovery Planning

The proponent must have an effective approach for identifying, mitigating, managing and responding to emergencies and incidents that have the potential to impact the delivery of services.

Element #	Element	Requirement
8.1	Services during an Emergency	<p>CMHC reserves the right to adjust the services and requirements as required during a declared emergency.</p> <p>The proponent shall ensure that they have sufficient resources to fulfill CMHC’s requirements during an emergency.</p>
8.2	Responsibilities during a Disaster	The proponent shall ensure that they are properly trained on their roles and responsibilities as it relates to the services in the event of a disaster and shall work with CMHC in accordance with established CMHC’s protocols for decision making and implementation of plans as appropriate, including integration with CMHC activity-specific emergency plans.

		<p>The proponent shall work with CMHC in accordance with established CMHC protocols for decision making and implementation of plans as appropriate, including integration with CMHC activities-specific disaster plans.</p>
8.3	Implement Disaster Recovery Plan	<p>The proponent shall support CMHC in the development of a national business continuity plan as it relates to the services. The proponent shall participate in joint committees and develop material as required to input into the plan.</p> <p>The proponent shall maintain a Disaster Recovery Plan in conjunction with CMHC. The Disaster Recovery Plan shall consider and provide continuity options and solutions for all possible emergency and disaster situations as well as for discontinuity of services provided by the proponent. The plan shall cover services that are within the proponent’s control.</p> <p>The Disaster Recovery Plan shall be developed by the proponent, as requested, in consultation with, and through written approval by CMHC. The proponent shall provide all input and information necessary for CMHC to develop and update its own plans.</p> <p>The proponent shall, upon CMHC’s request, participate in boards and committees related to emergency management matters, both as it relates to planning contingencies and developing business continuity plans and in implementing the plans in the event of an actual emergency.</p>
8.4	Proponent Business Continuity Plan	<p>The proponent shall submit the initial completed Business Continuity Plan for the proponent’s internal and off-site operations and systems that may affect service delivery to CMHC in accordance with the Transition Plan and shall update it annually thereafter.</p>
8.5	Training and Testing	<p>The proponent shall submit the initial completed training plan on emergency management measures and response to CMHC in accordance with the Transition Plan and shall update it annually thereafter. The training plan must include CMHC input and written approval on both content and scheduling.</p> <p>The training and testing of contingency plans shall be done in conjunction with CMHC’s requirements and schedules.</p>

9 Records Management

Effective records management is important for information security and ongoing management as well as being important to the ability of CMHC to effectively monitor and audit the proponent.

Element #	Element	Requirement
9.1	Confidentiality	All records and information related to the CMHC are to be considered Confidential Information and proprietary in accordance with the terms of the Agreement. The proponent shall put in place mechanisms to ensure the confidentiality of all Confidential Information.
9.2	Safeguarding Information	The proponent shall store, back up, organize and protect all information with due regard to security and disaster recovery.
9.3	Availability of Records, Data and Information	The proponent shall ensure that all records, information and data can be retrieved and sent to CMHC within a reasonable timeframe. The proponent shall make available all data and information related to the CMHC surveys when requested by CMHC, including custom or ad hoc information, in the format required by CMHC and in the software to be mutually agreed upon between the proponent and CMHC.

10 Transition

The Transition Plan is an important element to provide planning and management to the start-up process associated with completion of the ongoing services. The plan provides a comprehensive view of all activities and milestones for the proponent and CMHC.

Element #	Element	Requirement
10.1	Application of the Transition Requirements	The transition requirements apply at the transition approach and preliminary Transition Services Plan for conducting the transfer of the services from CMHC to the proponent. The proponent shall comply with Schedule G: <i>Transition Services Plan</i> . In the event that there is a conflict between this Section 10 and with Schedule G: <i>Transition Services Plan</i> the later will take precedence.
10.2	Gradual Implementation of Services	CMHC may request for the gradual implementation of services during the first quarter of 2017. The proponent shall provide a strategy for the implementation of all services beginning January 1 st , 2017 as well as the gradual implementation of services in Q1 of 2017.
10.3	Transition Commencement	CMHC and the proponent shall begin the transition and work collaboratively to ensure the deliverables and transition are conducted and completed in a timely manner.

10.4	Transition Manager	<p>The proponent shall appoint a Transition Manager to represent it during the transition period. The Transition Manager shall be named no later than (15) days following the effective date. The Transition Manager shall be responsible for managing and integrating all activities of the Transition. This includes setting, managing, reporting and providing minutes and other support for all transition meetings and activities.</p>
10.5	Transition Committee	<p>The proponent shall establish a transition committee with CMHC to ensure a smooth transition. The committee shall be established no later than fifteen (15) days after the effective date. This committee shall be comprised of senior managers of both the proponent and CMHC and shall be responsible for ensuring that all aspects of the transition are suitably resourced, planned, guided and managed. The proponent’s Transition Manager shall chair the transition committee.</p>
10.6	Transition Plan	<p>The Transition Plan shall be developed by the proponent in sufficient detail to provide activities, sub-activities, start dates, end dates and level of effort (preferably in a Gantt chart), with the input and involvement of CMHC to ensure the Transition Plan is coordinated with any required CMHC activities. The plan shall be completed no later than the effective date.</p> <p>The Transition Plan shall include a timetable for completion of all activities, including the following:</p> <ul style="list-style-type: none"> • Milestones at which CMHC must provide input and approvals; • Timeframes for the transition based on priorities, starting with the most complex and critical; and • Services and issues. <p>The Transition Plan must include the following elements:</p> <ul style="list-style-type: none"> • Transition Plan for the services; • All contract deliverables; and • All documents and plans referred throughout the service requirements for delivery during transition. <p>The proponent’s Transition Plan, shall also address, but not be limited to, the following:</p> <ul style="list-style-type: none"> • Schedule of delivery or milestone dates to implement the requirements; • Development of processes and procedures in conjunction with CMHC, including change

		<p>management interaction with CMHC;</p> <ul style="list-style-type: none"> • Documentation and reporting, including data elements and report formats; • Meetings and CMHC input / feedback; • Human resource implications; and • Training development and transition for the proponent’s team and resources.
10.7	Transition Plan Approval	<p>The Transition Plan shall be submitted to CMHC for review. If accepted (in writing), the Transition Plan will be used as a management document to guide the transition activities.</p> <p>If not accepted, the proponent shall re-submit within one (1) week or on a later date identified by CMHC. CMHC shall re-review the plan and either accept the plan or request further revisions until the Transition Plan is accepted.</p> <p>CMHC has the right to request changes to the Transition Plan in order to adapt to its operational environment or priorities.</p>

11 Transition Out – Hand Back

There must be an organized, well-managed transition from the proponent to CMHC or a new service provider that CMHC may designate to take over the services at the expiration of the term or in the event of termination.

Element #	Element	Requirement
11.1	Application of the Transition Out Requirements	The transition out / hand back requirements apply at the end of the term or in the event of a termination in accordance with the Agreement. The proponent shall comply with Schedule H: <i>Termination Services Plan</i> . In the event that there is a conflict between this Section 11 and Schedule H: <i>Termination Services Plan</i> the later will take precedence.
11.2	Work Together Collaboratively	The proponent shall work collaboratively with CMHC to establish and manage a transition out /hand back process. The proponent shall work with CMHC and a new service provider who may be designated to take over the services. The new service provider may be either a third party proponent or CMHC itself.

		<p>The proponent may be required to participate in and support committees and activities of the new service provider.</p> <p>The proponent shall also provide CMHC with the information required to respond to questions related to any procurement processes initiated by CMHC.</p> <p>The proponent shall not transfer any resources without prior written approval from CMHC within the last six (6) months prior to the expiry date of the Agreement.</p>
11.3	Expeditious and Orderly Transfer of Services	The proponent shall ensure a seamless transition that provides expeditious and orderly transfer of the proponent’s responsibilities with no disruption to CMHC services.
11.4	Transition Manager	<p>The proponent shall appoint a Transition Manager to represent it during the transition out. The Transition Manager shall be named six (6) months (or a time otherwise agreed to by CMHC) prior to the termination date. Under the direction of CMHC, the Transition Manager shall be responsible for managing and integrating all related activities of the transition out including those of CMHC and subcontracted services. This includes setting, managing, reporting and providing minutes and other support for all transition out meetings and activities.</p> <p>The Transition Manager shall also be responsible for interfacing and coordinating with CMHC and/or a new provider as required ensuring a smooth and orderly transition.</p>
11.5	Transition Committee	<p>The proponent shall establish a transition committee with CMHC to ensure a smooth transition out.</p> <p>The transition committee shall be established six (6) months (or a time otherwise agreed to by CMHC in writing), prior to termination or the end of the term, as applicable. This committee shall be comprised of senior managers of both the proponent and CMHC and shall be responsible for ensuring that all aspects of the transition out are suitably resourced, planned, guided and managed.</p> <p>The proponent’s Transition Manager shall chair the transition out committee.</p>

11.6	Transition Out Plan	<p>The proponent shall be responsible for developing a detailed transition out plan jointly with CMHC in accordance with the provisions and general guidelines provided in this Section. The plan shall be completed six (6) months (or a time otherwise agreed to by CMHC in writing) prior to termination or expiry and shall include at a minimum a schedule of activities and sub-activities to be undertaken during the transition, including (at a minimum) proposed start and end dates and duration (e.g. level of effort), assigned resources, priority and dependencies related to:</p> <ul style="list-style-type: none"> • Human resources; • Subcontracted services; • Finance; and • Records Management, data and information;
11.7	Transition-Out Plan Review and Approval Process	<p>The proponent shall provide the transition out plan to CMHC who shall review the plan and either:</p> <ul style="list-style-type: none"> • Accept the transition out plan or • Request revisions to the transition out plan <p>If CMHC requests for revisions, the proponent shall re-submit within two (2) weeks or on a later date identified by CMHC in writing.</p>
11.8	Information and Data	<p>The proponent shall ensure that all information and data in whatever form is returned to CMHC.</p>
11.9	Subcontracted Goods and Services	<p>Six (6) months prior (or as otherwise agreed to by CMHC in writing) to the termination or expiry of the Agreement, the proponent shall provide a complete list of goods and services including contact information for the subcontractors involved in the delivery of all services. The proponent shall communicate with all subcontractors to advise them of the transition and request that they cooperate with either CMHC or the new service provider.</p>

12 Reference Tables

Table 4. Schedule for the Services in 2016 and 2017

Phase	Task	Lead	Start Date	End Date	Due Date
Transition	Transition Period	Proponent	Effective Date	June 30, 2017	
	Transition Plan	Proponent			Effective Date
	Communication Plan	Proponent			October 31, 2016
	Staffing Plan	Proponent			October 31, 2016

	Business Continuity Plan	Proponent			October 31, 2016
	Disaster Recovery Plan	Proponent			October 31, 2016
	Staffing Agreement	Proponent			November 30, 2016
	Operational Model	Proponent			November 30, 2016
	Organization Chart	Proponent			November 30, 2016
	SCS and MAS Hiring Process for Enumerators	Proponent	November 1, 2016	December 31, 2016	December 31, 2016
	SCS and MAS Training	Proponent	December 1, 2016	January 6, 2016	
Starts and Completions Survey (SCS)	SCS Survey Enumeration	Proponent	January 1, 2017	December 31, 2017	
Market Absorption Survey (MAS)	SCS Survey Enumeration	Proponent	January 1, 2017	December 31, 2017	
Seniors' Housing Survey (SHS)	SHS Hiring Process for Interviewers and Data Entry Clerks Staff	Proponent	December 5, 2016	January 6, 2017	
	SHS Training	CMHC	January 23, 2017	January 27, 2017	
	SHS Survey Administration	Proponent	January 30, 2017	February 24, 2017	
Condo Vacancy Survey (CVS)	CVS Hiring Process for Interviewers and Data Entry Clerks Staff	Proponent	July 3, 2017	August 4, 2017	
	CVS Training	CMHC	August 17, 2017	August 22, 2017	
	CVS Survey Administration	Proponent	August 23, 2017	September 22, 2017	
Rental Market Survey (RMS)	RMS Hiring Process for Interviewers and Data Entry Clerks Staff	Proponent	July 31, 2017	September 8, 2017	

	RMS Training	CMHC	September 24, 2017	September 29, 2017	
	RMS Survey Administration	Proponent	October 2, 2017	November 3, 2017	
Reports	Organizational Chart (as required)	Proponent	January 1, 2017	December 31, 2017	
	Salary Benchmarking Report	Proponent	January 1, 2017	January 1, 2017	
	Subcontractor List (quarterly)	Proponent	January 1, 2017	December 31, 2017	
	Time and Attendance Report (monthly)	Proponent	January 31, 2017	December 31, 2017	

Table 5. Ranges for the Expected Number of Hours of Work* by Job Title and Region

Region	Enumerator		Interviewer		Data Entry Clerk		Total	
	Min	Max	Min	Max	Min	Max	Min	Max
<i>Atlantic</i>	3,000	4,500	1,500	2,500	250	750	4,750	7,750
<i>British Columbia</i>	7,000	10,000	2,750	4,250	500	1,000	10,250	15,250
<i>Ontario</i>	15,000	22,000	7,750	11,500	750	1,250	23,500	34,750
<i>Prairies</i>	13,500	20,500	2,500	3,750	750	1,250	16,750	25,500
<i>Quebec</i>	6,000	8,000	12,250	17,000	2,500	4,000	20,750	29,000
Total	44,500	65,000	26,750	39,000	4,750	8,250	76,000	112,250

*The number of hours of work cannot be forecasted precisely as it depends on the housing activity, which in turn, depends on the economic conditions. The numbers provided above correspond to the housing activity of recent years. It is provided for your information only and CMHC cannot be held responsible if volumes go outside the provided ranges.

Table 6. Ranges for the Expected Number of Kilometres Travelled* by Job Title and Region

Region	Enumerator		Interviewer		Data Entry Clerk		Total	
	Min	Max	Min	Max	Min	Max	Min	Max
<i>Atlantic</i>	64,500	96,500	500	1,000	N/A	N/A	65,000	97,500
<i>British Columbia</i>	60,000	90,000	1,250	1,750	N/A	N/A	61,250	91,750
<i>Ontario</i>	136,000	204,000	1,250	1,750	N/A	N/A	137,250	205,750
<i>Prairies</i>	152,000	228,000	5,600	8,400	N/A	N/A	157,600	236,400
<i>Quebec</i>	88,000	132,000	100	1,500	N/A	N/A	88,100	133,500
Total	500,500	750,500	8,700	14,400	N/A	N/A	509,200	764,900

*The number of kilometres travelled cannot be forecasted precisely as it depends on the housing activity, which in turn, depends on the economic conditions. The numbers provided above correspond to the housing activity of recent years. It is provided for your information only and CMHC cannot be held responsible if volumes go outside the provided ranges.