

REQUEST FOR PROPOSAL

FOR

Survey Data Collection & Data Entry Services

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201602121*

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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

*CMHC wishes to enter into an **Agreement** with a vendor(s) (hereafter referred to as the “proponent(s)”) for the purpose of providing the staffing and human resources administrative tasks for the enumeration services to support the conduct of the Starts and Completions Survey and Market Absorption Survey as well as interviewing and data entry services to support the conduct of the Rental Market Survey, Condo Vacancy Survey and Seniors’ Housing Survey beginning January 1st, 2017. CMHC will remain the surveys subject matter specialist and maintain responsibility for managing the surveys.*

This Agreement will have an initial term of up to two (2) years, with the potential to renew for four (4) subsequent two (2) year renewals, not to exceed a cumulative total of ten (10) years.

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 Development, and Minister responsible for Canada Mortgage and Housing Corporation, the Honourable 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.

I.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.

I.5 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 |
|------------------------|---|
| <i>July 12, 2016</i> | <i>Request for Proposal issued</i> |
| <i>August 7, 2016</i> | <i>Submission of Questions Deadline</i> |
| <i>August 12, 2016</i> | <i>Submission Deadline</i> |
| <i>August, 2016</i> | <i>Evaluation and Selection of Lead Proponent</i> |
| <i>August, 2016</i> | <i>Agreement award and finalization with lead proponent</i> |
| <i>September, 2016</i> | <i>Announcement of successful proponent</i> |
| <i>September, 2016</i> | <i>As requested, debriefing to unsuccessful proponents</i> |

I.6 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.*

I.7 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.8 Proponent Feedback

CMHC aims to continuously improve its bid documents and procedures. CMHC welcomes input regarding proponent experience in responding to its RFPs, whether 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 # 201602121** 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.9 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 # 201602121

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 August 12, 2016

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

2.4 Inquiries

All questions regarding this RFP must be sent by e-mail or facsimile to the following contact person:
Heather Forsyth, Procurement Advisor
Fax: (613) 748-2554
Email: hforsyth@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.*

2.5 Communication

During proposal evaluations, CMHC reserves the right to contact or meet with any individual proponent in order to obtain clarification of its submission, 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.

2.6 Proponent Contact

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

2.7 Offering Period

MANDATORY

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.

2.8 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.*

2.9 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.

2.10 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.

2.11 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.

2.12 Verification of Proposals

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

2.13 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.

2.14 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.

2.15 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.

2.16 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.

2.17 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.

2.18 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.*

2.19 Security

Security Clearance:

CMHC requires employees of the selected proponent to be security cleared in order to permit them access to CMHC premises and information when and if required. This process normally takes approximately five working days, but may take longer, depending on the circumstances. In cases where the employee holds a valid PWGSC security clearance, a signed copy of the TBS 330-47 Security Screening Certificate and Briefing Form will be required.

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 until the required clearance has been granted. 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.

2.20 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.

2.21 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.

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

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

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

The Canada Mortgage and Housing Corporation's Market Analysis Centre is responsible for the conduct of several surveys related to the residential housing markets in Canada. These surveys include the Starts and Completions Survey, Market Absorption Survey, Rental Market Survey, Condo Vacancy Survey, Seniors' Housing Survey, Household Rent Survey and Condominium Owner Survey.

CMHC is seeking a service provider for the purpose of providing the staffing and human resources administrative tasks for the enumeration services to support the conduct of the Starts and Completions Survey and Market Absorption Survey as well as interviewing and data entry services to support the conduct of the Rental Market Survey, Condo Vacancy Survey and Seniors' Housing Survey beginning January 1st, 2017. CMHC will still be the surveys subject matter specialist and maintain responsibility for managing the surveys (see Section 1.6 in Schedule A: Statement of Work).

Starts and Completions Survey

The Starts and Completions Survey (SCS) is a census survey carried out on a monthly basis in urban areas with populations in excess of 50,000 (and exception areas) and on a quarterly basis (i.e. four times a year, in March, June, September and December) in urban areas with populations of 10,000 to 49,999 as defined by the latest Census (see [Appendix D](#)). SCS is conducted by site visits requiring the enumerators to drive to construction areas / sale offices in larger centres and by telephone calls (not formal interviews) and emails in more rural centres which are used to confirm that new units have reached set stages in the construction process. Since most municipalities in the country issue building permits, these are used as an indication of where construction is likely to take place. In areas where there are no permits, reliance has to be placed either on local sources or searching procedures (defining ultimate routes and web research is an important component of the enumerator's work on a monthly basis, this should count for 10-20% of their time depending on the area).

Market Absorption Survey

The Market Absorption Survey (MAS) is a census survey carried out in conjunction with the Starts and Completions Survey, but is only conducted in urban areas with populations in excess of 50,000 (and some exception centres identified every year) as defined by the latest Census (see [Appendix D](#)) and only for structures which are destined for the homeownership/condominium market. A dwelling is defined as being “absorbed” when a binding, non-conditional agreement is made to buy the dwelling. When a structure is recorded as completed, an update is also made as units are sold. The dwellings are then visited or contacted by phone or email each month until such time as full absorption occurs.

Rental Market Survey

The Rental Market Survey (RMS) is a phone survey conducted every year in **October** on a sample basis in all urban areas with populations of 10,000 and more as defined by the latest Census (see [Appendix D](#)). The survey targets only privately initiated structures with at least three rental units, which have been on the market for at least three months. The survey is mainly conducted by supervised formal telephone interviews (with potential for follow-up calls / e-mails) and occasional punctual site visits. The information is obtained from the property managers, the building superintendents and the owners.

Condo Vacancy Survey

The Condo Vacancy Survey is a census survey conducted every year in **August to September** in Halifax, Quebec, Montreal*, Gatineau, Ottawa, Greater Toronto Area, Hamilton, Kitchener – Cambridge - Waterloo, London, Winnipeg, Regina, Saskatoon, Edmonton, Calgary, Kelowna, Vancouver and Victoria (*samples are used in these centres). The survey is mainly conducted by supervised formal telephone interviews (with potential for follow-up calls / e-mails) and occasional punctual site visits (if no telephone contact is made). The information is obtained from the property managers, the condo boards, the building superintendents and the owners.

Seniors’ Housing Survey

The Seniors’ Housing Survey is a census survey conducted every year in **February** throughout Canada. The survey is mainly conducted through supervised formal telephone interviews (with potential for follow-up calls / e-mails / faxes) and occasional punctual site visits (if no telephone contact is made). The information is obtained from the residence manager or administrator.

3.3.2 Current Situation

The Canada Mortgage and Housing Corporation currently employs enumerators, interviewers and data entry clerks across the country (see [Appendix D](#)) to conduct Starts and Completions Survey (SCS), Market Absorption Survey (MAS), Rental Market Survey (RMS), Condo Vacancy Survey (CVS) and Seniors Housing Survey (SHS).

Job Descriptions

Several resources including enumerators, interviewers and data entry clerks are required to conduct the surveys. Most employees only perform 1 job however there are several employees who perform multiple jobs. The job descriptions are listed below.

Enumerators

CMHC currently employs about 100-200 enumerators for SCS and MAS. The enumerators for SCS and MAS are required to do site visits using their own personal vehicle (or rental car if deemed less expensive) to confirm that new units have reached set stages in the construction process and record this information on a paper survey questionnaire. As part of their duties, they may also be asked to utilize a special scanner / GPS device (provided by CMHC) to precisely locate the surveyed structures. These GPS devices also collect geographic information in the background every five seconds while they are working / driving (i.e. a process called “bread crumbing”). This “bread crumbing” data will primarily be used to map new street and addresses, but CMHC also use this information to monitor the travel and hours of the enumerators in order to validate mileage and time claims. The enumerator’s volume of work depends on the number of starts / completions in the housing market which fluctuates greatly within the year (e.g. less construction in February compared to June) as well as from year to year (e.g. 2016 compared to 2017). The enumerator’s work schedule is very flexible as they are able to dictate their own daily work schedule (week days or weekends) and they do not have to work regular business hours (obviously working during rush hours is not recommended). Once an enumerator receives the survey questionnaire from CMHC’s regional offices (through courier), which usually occurs early in the month, the enumerator must complete these cards and return them to the regional office by the deadline identified by their CMHC supervisor (a permanent Survey Administrator), which is usually 5-6 days before the end of the month.

Interviewers

CMHC currently employs about 200-300 interviewers (the same employee could work on several surveys) for the RMS, CVS and SHS. The interviewers for RMS, CVS and SHS conduct the surveys through the telephone and record the responses on paper survey questionnaires. The interviewers work schedule unlike the enumerators usually follows the regular business hours. Most of the interviewers work from CMHC regional offices on CMHC’s computers / systems, but some could work from home on paper survey questionnaires assigned to them.

Data Entry Clerks

CMHC currently employs about 40-70 data entry clerks for RMS, CVS and SHS. The data entry clerks for RMS, CVS and SHS enter the responses from the paper survey questionnaires in to the respective CMHC survey applications. The data entry clerk work schedule unlike the enumerators usually follows the regular business hours. They all work on-location in CMHC’s regional offices on CMHC’s computers / systems.

A detailed summary of the job descriptions are located in Schedule B: Job Descriptions.

CMHC Regional Offices

CMHC Canada is split in to 5 regions: Atlantic, Quebec, Ontario, Prairies and British Columbia. The CMHC regional office locations for each region are: Halifax (Atlantic), Montreal (Quebec), Ottawa and Toronto (Ontario), Calgary (Prairies) and Vancouver (British Columbia). Currently, the enumerators, interviewers and data entry clerks all report to a CMHC supervisor at the associated CMHC regional office. The same kind of relationship would still exist for survey operations and subject matter issues under an agreement derived from this RFP. The CMHC supervisor is responsible for staff supervision, monitoring survey data quality and enumeration travel and hours, survey training, scheduling and

assigning work tasks to the enumerators, interviewers and data entry clerks. The training and survey conduct (interviewing and data entry) for the telephone surveys (RMS, CVS, SHS) mostly takes place in the CMHC regional offices.

Security Clearance

The enumerators, interviewers and data entry clerks must all obtain and maintain a security clearance level of Reliability Status.

Compensation

Enumerators, interviewers and data entry clerks currently have a salary range of \$36,140 to \$45,162 per year plus authorized expenses. The salary range varies depending on years of service and work assignment. The table below (provided for reference only) outlines the current average CMHC hourly rates by job title and years of experience.

Table 1. Current Average CMHC Hourly Rates by Years of Experience and Job Title

| Job Title | Years of Experience | | | |
|-------------------------|---------------------|---------|---------|---------|
| | 1-2 | 3-5 | 6-10 | >10 |
| Enumerator | \$18.50 | \$19.25 | \$19.75 | \$20.25 |
| Interviewer | \$18.50 | \$19.00 | \$19.75 | \$20.25 |
| Data Entry Clerk | \$17.25 | \$18.00 | \$18.50 | \$19.00 |

These resources also receive a 4% vacation pay entitlement for 4 or less years of service and 6% vacation pay entitlement after 5 years of service on a monthly basis. In addition, the enumerators are compensated for the number of kilometres travelled to conduct the surveys. CMHC follows the Federal Government guideline for the kilometre rates. The table below (provided for reference only) outlines the CMHC kilometre rates as of July 1, 2016.

Table 2. Federal Government / CMHC Kilometre Rates Effective July 1, 2016

| Province/Territory | Cents/km (taxes included) |
|----------------------------------|------------------------------|
| Alberta | 43.0 |
| British Columbia | 47.0 |
| Manitoba | 45.5 |
| New Brunswick | 48.0 |
| Newfoundland and Labrador | 50.5 |
| Northwest Territories | 56.5 |
| Nova Scotia | 48.5 |
| Nunavut | 57.5 |
| Ontario | 53.5 |
| Prince Edward Island | 46.5 |
| Quebec | 49.0 |
| Saskatchewan | 44.5 |

| | |
|--------------|-------------|
| Yukon | 57.0 |
|--------------|-------------|

The enumerators are compensated every 2 weeks or monthly based on the region by the number of hours and the kilometres they submit on a bi-weekly or monthly basis. The data entry clerks and interviewers are compensated every 2 weeks by the number of hours they submit on a weekly basis.

Employment Schedule

The SCS, MAS, RMS, CVS and SHS are conducted at different times of the year. The table below describes the contract duration and period of work corresponding to each survey that is required for the enumerators, interviewers and data entry clerks. Please note that the hours of work per month for the enumerators vary by location of work.

Table 3. Survey Contact Duration and Period of Survey Conduct

| Survey | Contract Duration | Period of Survey Conduct |
|----------------|--------------------------|---|
| SCS/MAS | 1 year | January to December (approx. 2 weeks or less) |
| RMS | Approximately 1 month | Last week of September to the end of October |
| CVS | Approximately 1 month | Last week of August to the last week of September |
| SHS | Approximately 1 month | Last week of January to the last week of February |

Number of Employees

The number of enumerators, interviewers and data entry clerks required to conduct the survey varies greatly from year to year. The number of employees required to conduct the survey depends on the housing market activity as well as the scope of the survey.

In 2014, CMHC required around 88,647 hours and employed around 351 casual and contract employees to conduct SCS, MAS, RMS, CVS and SHS. The table below (provided for reference only) summarizes the number of employees by region.

Table 4. Number of Casual Employees by Region in 2014

| Region | Number of Employees |
|----------------------------------|----------------------------|
| Atlantic | 43 |
| British Columbia | 37 |
| Ontario | 111 |
| Prairies | 67 |
| Quebec | 93 |
| Total Number of Employees | 351 |

The table below (provided for reference only) summarizes the number of employees by region and function. Please note that the total number of employees does not match those in Table 4 because many of the enumerators worked on other surveys other than SCS/MAS.

Table 5. Number of Casual Employees by Position and Region in 2014

| Region | Enumerators (SCS/MAS) | Interviewers and Data Entry Clerks (RMS/CVS/SHS) | Total |
|--------------------------------------|----------------------------------|---|--------------|
| Atlantic | 22 | 30 | 52 |
| British Columbia | 13 | 46 | 59 |
| Ontario | 40 | 108 | 148 |
| Prairies | 38 | 61 | 99 |
| Quebec | 19 | 112 | 131 |
| Total Number of Employees | 132 | 357 | 489 |

As mentioned above, some employees work on multiple surveys (e.g. some of the SCS/MAS enumerators also work on the RMS) due to the short duration of some of the surveys and also because they have proven to be valuable employees for CMHC. Of the 351 casual employees, 122 employees worked on multiple surveys. The assignment of employees on multiple surveys decreases the time spent on human resources as well as training. The table below (provided for reference only) summarizes the number of employees that worked on multiple surveys by region.

Table 6. Number of Employees that Worked on Multiple Surveys in 2014

| Region | Worked on Multiple Surveys | | Total |
|--------------------------------------|---------------------------------------|------------|--------------|
| | NO | YES | |
| Atlantic | 34 | 9 | 43 |
| British Columbia | 19 | 18 | 37 |
| Ontario | 79 | 32 | 111 |
| Prairies | 41 | 26 | 67 |
| Quebec | 56 | 37 | 93 |
| Total Number of Employees | 229 | 122 | 351 |

3.3.3 Services Required

Refer to the following appendices for further details on the services required:

Schedule A: Statement of Work

Appendix E: Mandatory Requirements

Appendix F: Rated Requirements

CMHC is interested in exploring service options from proponents that demonstrate excellence in the services outlined in the appendices. The successful proponent is expected to provide services in a manner that closely aligns with CMHC's current business practices and corporate values and culture.

As stated in the corporation's statement of values, CMHC strives to achieve business excellence. We exercise the highest standards of competence, trustworthiness and prudence in conducting our business relationships and in managing the financial, physical and human resources entrusted to our care. We encourage learning, innovation and personal initiative to continuously improve the way we do business and achieve the best possible results for the Canadian public.

CMHC is a high-performing organization that strives for excellence in all its endeavours. CMHC therefore expects the same high standards and commitment to excellence from all its third party service providers. The successful service provider will demonstrate a thorough understanding of CMHC's work environment, expected standards and requirements by ensuring that all of the following conditions are fulfilled consistently on an ongoing basis:

- CMHC is transacting with seasoned and qualified staff, where staff turnover is minimal.
- The proponent has the ability to quickly adapt and adjust workload and personnel to handle unplanned requests that can often require very short turnaround times.
- Proponent staff is accountable for their actions and mutually agreed timelines are followed through and met.
- Proactive ideas or solutions are provided, where both parties look for opportunities to enhance processes instead of being purely driven by rigid processes.
- Attention to detail, with an emphasis on quality control especially in written communications with CMHC employees and related individuals in their official language is clearly evident and carried out at all times.

3.3.4 Mandatory Requirements

To qualify as an eligible proponent, a proponent must meet each and all of the mandatory requirements identified in Appendix E: Mandatory Requirements. The proponent must confirm that they provide each of the services identified in Appendix E. If there are any deficiencies, list them in the Additional Comments column and indicate how they are to be overcome. Proponents must use Appendix E as the only acceptable mandatory requirement response grid.

3.3.5 Rated Requirements

Submissions from eligible proponents will be evaluated as noted in Appendix B with detailed information contained in Appendix F: Rated Requirements. Proponents must number the clauses in their submissions to align with the numbering convention shown in Appendix F. Please number your responses to match the numbering of the questions.

4 SECTION 4 PROPOSAL REQUIREMENTS

4.1 Overview of Section 4

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

Response Item

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

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

Requirements for each Response Item are detailed below.

4.2 Mandatory Proposal Requirements

Certain requirements in section 4 are identified as mandatory. See Section 1.6 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 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.

4.5 Proponent's Qualifications

MANDATORY

The proponent's proposal must include information about the proponent's qualifications as detailed in Appendix F, Section 1.

4.6 Response to Statement of Work

MANDATORY

The proponent must provide detailed information relative to the specifications listed in Section 3, The Statement of Work and Schedule A: Statement of Work.

4.7 Project Management Plan

MANDATORY

The proponent **MUST** 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 for the provision of reports (Schedule E: Reports) 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.
- (e) The proponent's plan for ensuring continuous improvement of its practices and procedures for delivering the services.
- (f) The proponent's plan to ensure the availability of qualified proponent personnel to perform the services as well as the proponent's plan to minimize personnel turnover.

Refer to Appendix F, Section 5.

4.8 Financial Information

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).

4.8.1 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.

4.9 Other Information

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

4.10 Pricing Proposal

MANDATORY

The proponent must provide a response outlining the pricing of its proposed solution in a detailed manner as per the Tables shown below

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.

4.10.1 Service Costs

The table below outlines the annual low range and high range for the expected hours of work and kilometres travelled that will be required for the services on an annual basis. The number of hours of work and kilometres travelled cannot be forecasted precisely as it depends on the housing activity, which in turn, depends on the economic conditions. The numbers provided below correspond to the housing activity of recent years. It is provided for your reference only and CMHC cannot be held responsible if volumes go outside the provided ranges.

| Item | Low Range | High Range |
|-----------------------------|--------------|---------------|
| Hours of Work | 76,000 hours | 112,250 hours |
| Kilometres Travelled | 509,200 km | 764,900 km |

Please refer to Schedule A: Statement of Work Section 12 Table 5 for the ranges for the expected number of hours of work by job title and region and Schedule A: Statement of Work Section 12 Table 6 for the ranges for the expected number of kilometers travelled by job title and region.

The proponent must provide in the table below the overhead percentage for the provision of the services.

Table 7. Overhead Percentage

| Overhead Percentage | Comments |
|---------------------|----------|
| | |

The proponent must identify in the table below the costs associated with the transition plan.

Table 8. Transition Plan (One Time Cost)

| Item | Cost | Comments |
|---|------|----------|
| Development | | |
| Implementation | | |
| Other Direct Costs (Specify in comments field) | | |
| Total Cost | | |

The proponent must identify in the table below the costs associated with other costs.

Table 9. Other Costs

| Item | Cost | Comments |
|---|------|---|
| In the event that the service agreement is not renewed or terminated, provide applicable fees, if any. (One Time Cost) | | |
| Provide details of any other activities which would be charged on a time and expense basis. | | <i>Proponent must identify if activities are a one-time cost of reoccurring cost.</i> |
| Total Cost | | |

4.10.2 Hourly and Kilometre Rates

The table below (provided for reference only) outlines the current average CMHC hourly rates by years of experience and job title for 2016.

| Job Title | Years of Experience | | | |
|-------------------------|---------------------|---------|---------|---------|
| | 1-2 | 3-5 | 6-10 | >10 |
| Enumerator | \$18.50 | \$19.25 | \$19.75 | \$20.25 |
| Interviewer | \$18.50 | \$19.00 | \$19.75 | \$20.25 |
| Data Entry Clerk | \$17.25 | \$18.00 | \$18.50 | \$19.00 |

The proponent must identify in the table below the average hourly rate for each job title corresponding to the years of experience.

Table 10. Proponent Average Hourly Rates by Years of Experience and Job Title

| Job Title | Years of Experience | | | |
|-------------------------|---------------------|-----|------|-----|
| | 1-2 | 3-5 | 6-10 | >10 |
| Enumerator | | | | |
| Interviewer | | | | |
| Data Entry Clerk | | | | |

The table below (provided for reference only) outlines the Federal Government / CMHC kilometre rates as of July 1st, 2016.

| Province | Cents/Km |
|-------------------------|----------|
| Alberta | 43.0 |
| British Columbia | 47.0 |
| Manitoba | 45.5 |

| | |
|----------------------------------|------|
| New Brunswick | 48.0 |
| Newfoundland and Labrador | 50.5 |
| Northwest Territories | 56.5 |
| Nova Scotia | 48.5 |
| Nunavut | 57.5 |
| Ontario | 53.5 |
| Prince Edward Island | 46.5 |
| Quebec | 49.0 |
| Saskatchewan | 44.5 |
| Yukon | 57.0 |

The proponent must identify in the table below the kilometre rates for each province.

Table II. Proponent Kilometre Rates

| Province | Cents/Km |
|----------------------------------|-----------------|
| Alberta | |
| British Columbia | |
| Manitoba | |
| New Brunswick | |
| Newfoundland and Labrador | |
| Northwest Territories | |
| Nova Scotia | |
| Nunavut | |
| Ontario | |
| Prince Edward Island | |
| Quebec | |
| Saskatchewan | |
| Yukon | |

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 will first be individually evaluated by each member of the Evaluation Committee that is formed by CMHC for this purpose. Evaluators will evaluate each proposal in accordance with the evaluation criteria as shown in the Evaluation Tables, Appendix "B" and Appendix "BI". Once individual evaluations are complete, the Evaluation Committee members will discuss their scores 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, Appendix "B") to remain in the evaluation process.

Each compliant proposal that meets the minimum upset scores in each category shall then be evaluated as indicated in Appendices B and B I.

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 4.8 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.

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

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

4.3. 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

MANDATORY

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 \$10,000,000 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*

- *property damage including completed operations*
- *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).*

b) Fidelity Bond/Employee Dishonesty Insurance

The Proponent shall carry a fidelity bond/employee dishonesty insurance with an insurer licensed to do business in Canada. The policy shall extend to include a third party extension (client coverage) citing CMHC as a beneficiary with respect to services performed under the contract. Insurance is to include a third party extension for a limit of not less than \$50,000.

c) Network Security Liability and Privacy Liability

The Proponent will provide and maintain Network Security Liability and Privacy Liability with an insurer licensed to do business in Canada with a limit of not less than \$5,000,000 and for the duration of the contract. The policy will provide 30 days prior written notice of cancellation to CMHC's Senior Advisor, Corporate Insurance, 700 Montréal Road, Ottawa, Ontario K1A 0P7. Coverage is to include Proponent's employees and Proponent's contract employees (if applicable) as named insured. The Proponent shall ensure that the policy is renewed continuously for a minimum period of five (5) years following the expiration or early termination of this Agreement.

d) Automobile Insurance

The Proponent will provide and maintain Automobile Insurance with an insurer licensed to do business in Canada with limits of not less than \$2,000,000 Third Party Liability for all motor vehicles used by the Proponent in the performance of this Contract

Other conditions

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

All insurance policies required to be maintained by Proponent pursuant to 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

(Clearly and fully outline the deliverables which the Contractor will have to supply to fulfill his obligations under the Agreement and receive payment. The date of commencement and completion of the work as set out in Article 2.1 of the Agreement should be reiterated.)

(If the work and payment are to be in phases, the dates for completion of each phase must be specified, and the work and deliverable required at each phase completion date must be specified.)

(If specific individuals are to perform/supervise the work on behalf of the Contractor, they should be set out here.)

2. Project Management *{Optional, if necessary for administrative purposes}*

3. Schedule of Tasks and Allocation of Staff by Phases *{optional, if necessary for administrative purposes}*

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:

{All payments should be made contingent upon the Services being performed to the satisfaction of CMHC.}

{The phases should follow the phases set out in Schedule "A".}

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 | D |
|---|---------------------|------------------|----------------|--------------|
| | WEIGHT 100 Total | POINTS 0 to 5 | UPSET SCORE | SCORE AxB |
| <p>Criteria #1 - Proponent Qualifications The proponent will be evaluated based on the responses provided in Appendix F: Proponent's Qualifications.</p> <ul style="list-style-type: none"> • Description of organization • References • Office locations • Organization chart • Staffing plan • Back up process • Compensation package • Security screening • Problem management • Competitive advantage • Support business hours <p>Criteria #1 – Total Points, Column D</p> | 15 | | 52 | |
| <p>Criteria #2 - Strategic Sourcing The proponent will be evaluated based on the responses provided in Appendix F: Strategic Sourcing.</p> <ul style="list-style-type: none"> • # of subcontractors • Services subcontracted <p>Criteria #2 – Total Points, Column D</p> <p>0 – 1 Subcontractors = 3 points 2 – 3 Subcontractors = 2 points 4 – 5 Subcontractors = 1 point >5 Subcontractors = 0 points</p> | 5 | | 17 | |

| EVALUATION CRITERIA | A | B | C | D |
|---|---------------------|------------------|----------------|--------------|
| | WEIGHT 100 Total | POINTS 0 to 5 | UPSET SCORE | SCORE AxB |
| <p>Criteria #3 – Transition The proponent will be evaluated based on the responses provided in Appendix F: Transition.</p> <ul style="list-style-type: none"> • Past transitions • Transition plan • Transition project team • Hiring current CMHC resources • Transition process of current CMHC resources • Transition resource stability • Policies and procedures for transition • Transition-out • Transfer of knowledge <p>Criteria #3 – Total Points, Column D</p> | 15 | | 52 | |
| <p>Criteria #4 - Service Requirements The proponent will be evaluated based on the responses provided in Appendix F: Service Requirements.</p> <ul style="list-style-type: none"> • Survey conduct • Delivery organization • Communications • Management interfaces • Reports • Quality Management • Subcontractor Management • Business Continuity • Records Management • Transition • Transition Out – Hand Back <p>Criteria #4 – Total Points, Column D</p> | 35 | | 122 | |

| EVALUATION CRITERIA | A | B | C | D |
|---|---------------------|------------------|----------------|--------------|
| | WEIGHT 100 Total | POINTS 0 to 5 | UPSET SCORE | SCORE AxB |
| Criteria #5 - Project Management Plan The proponent will be evaluated based on the responses provided in Appendix F: Project Management Plan. <ul style="list-style-type: none"> • Project Management Approach • Quality Control • Status Reporting • Work Schedule • Interface with CMHC • Continuous Improvement • Availability of qualified personnel | 15 | | 52 | |
| Criteria #6 - Pricing Proposal The proponent will receive pricing points as reflected in Appendix B1. | 20 | | 70 | |
| TOTALS | 100 | | | |

APPENDIX B1

7.2 Pricing Evaluation Table

| EVALUATION CRITERIA | A | B | C |
|---|--------|------------------|--------------|
| | WEIGHT | POINTS 0 to 5 | SCORE AxB |
| <p>Criteria #1: Table 7. Overhead Percentage</p> <p><i>Submissions reflecting the lowest overhead percentage will receive 5 points. Submissions that reflect an overhead percentage greater than the lowest overhead percentage will receive points prorated accordingly.</i></p> <p><i>Criteria #1 – Total Points, Column C</i></p> | 50 | | |
| <p>Criteria #2: Table 8. Transition Plan (One Time Cost)</p> <p><i>Submissions reflecting the lowest total transition plan cost will receive 5 points. Submissions that reflect total transition plan cost higher than the lowest total transition plan cost submitted will receive points prorated accordingly.</i></p> <p><i>Criteria #2 – Total Points, Column C</i></p> | 15 | | |
| <p>Criteria #3: Table 9. Other Costs</p> <p><i>Submissions reflecting the lowest total other costs will receive 5 points. Submissions that reflect total other costs higher than the lowest total other costs submitted will receive points prorated accordingly.</i></p> <p><i>Criteria #3 – Total Points, Column C</i></p> | 5 | | |

| EVALUATION CRITERIA | A | B | C | | | | | | | | | | | | | | | | | | | |
|---|-----------|---|--------------|--|---------|------------------|----------|------------|---|---|---|-------------|---|---|---|------------------|---|-----|---|----|--|--|
| | WEIGHT | POINTS 0 to 5 | SCORE AxB | | | | | | | | | | | | | | | | | | | |
| <p>Criteria #4: Table 10. Proponent Average Hourly Rates by Years of Experience and Job Title</p> <p>The table below outlines the number points that will be received by job title and the percentage difference between the proponent's average hourly rate and the CMHC average hourly rate.</p> <table border="1" data-bbox="269 646 812 898"> <thead> <tr> <th rowspan="2">Job Title</th> <th colspan="3">Average Hourly Rate Percentage Difference</th> </tr> <tr> <th>< ±5.0%</th> <th>±5.0%- ±10.0%</th> <th>> ±10.0%</th> </tr> </thead> <tbody> <tr> <td>Enumerator</td> <td>2</td> <td>1</td> <td>0</td> </tr> <tr> <td>Interviewer</td> <td>2</td> <td>1</td> <td>0</td> </tr> <tr> <td>Data Entry Clerk</td> <td>1</td> <td>0.5</td> <td>0</td> </tr> </tbody> </table> <p>Points = ((sum of points by job title and years of experience) / 20) x 5</p> <p>Criteria #4 – Total Points, Column C</p> | Job Title | Average Hourly Rate Percentage Difference | | | < ±5.0% | ±5.0%- ±10.0% | > ±10.0% | Enumerator | 2 | 1 | 0 | Interviewer | 2 | 1 | 0 | Data Entry Clerk | 1 | 0.5 | 0 | 15 | | |
| Job Title | | Average Hourly Rate Percentage Difference | | | | | | | | | | | | | | | | | | | | |
| | < ±5.0% | ±5.0%- ±10.0% | > ±10.0% | | | | | | | | | | | | | | | | | | | |
| Enumerator | 2 | 1 | 0 | | | | | | | | | | | | | | | | | | | |
| Interviewer | 2 | 1 | 0 | | | | | | | | | | | | | | | | | | | |
| Data Entry Clerk | 1 | 0.5 | 0 | | | | | | | | | | | | | | | | | | | |

| EVALUATION CRITERIA | A | B | C | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--|----------|--------------------------------------|--------------|--|---------|------------------|----------|---------|---|-----|---|------------------|---|-----|---|----------|---|-----|---|---------------|---|-----|---|---------------------------|---|-----|---|-----------------------|---|-----|---|-------------|---|-----|---|---------|---|-----|---|---------|---|-----|---|----------------------|---|-----|---|--------|---|-----|---|--------------|---|-----|---|-------|---|-----|---|----|--|--|
| | WEIGHT | POINTS 0 to 5 | SCORE AxB | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <p>Criteria #5: Table II. Proponent Kilometre Rates</p> <p><i>The table below outlines the number points that will be received by province and the percentage difference between the proponent's kilometre rate and the CMHC kilometre rate.</i></p> <table border="1" data-bbox="269 615 810 1291"> <thead> <tr> <th rowspan="2">Province</th> <th colspan="3">Kilometre Rate Percentage Difference</th> </tr> <tr> <th>< ±5.0%</th> <th>±5.0%- ±10.0%</th> <th>> ±10.0%</th> </tr> </thead> <tbody> <tr><td>Alberta</td><td>1</td><td>0.5</td><td>0</td></tr> <tr><td>British Columbia</td><td>1</td><td>0.5</td><td>0</td></tr> <tr><td>Manitoba</td><td>1</td><td>0.5</td><td>0</td></tr> <tr><td>New Brunswick</td><td>1</td><td>0.5</td><td>0</td></tr> <tr><td>Newfoundland and Labrador</td><td>1</td><td>0.5</td><td>0</td></tr> <tr><td>Northwest Territories</td><td>1</td><td>0.5</td><td>0</td></tr> <tr><td>Nova Scotia</td><td>1</td><td>0.5</td><td>0</td></tr> <tr><td>Nunavut</td><td>1</td><td>0.5</td><td>0</td></tr> <tr><td>Ontario</td><td>1</td><td>0.5</td><td>0</td></tr> <tr><td>Prince Edward Island</td><td>1</td><td>0.5</td><td>0</td></tr> <tr><td>Quebec</td><td>1</td><td>0.5</td><td>0</td></tr> <tr><td>Saskatchewan</td><td>1</td><td>0.5</td><td>0</td></tr> <tr><td>Yukon</td><td>1</td><td>0.5</td><td>0</td></tr> </tbody> </table> <p>Points = $((\text{sum of points by province}) / 13) \times 5$</p> <p>Criteria #5 – Total Points, Column C</p> | Province | Kilometre Rate Percentage Difference | | | < ±5.0% | ±5.0%- ±10.0% | > ±10.0% | Alberta | 1 | 0.5 | 0 | British Columbia | 1 | 0.5 | 0 | Manitoba | 1 | 0.5 | 0 | New Brunswick | 1 | 0.5 | 0 | Newfoundland and Labrador | 1 | 0.5 | 0 | Northwest Territories | 1 | 0.5 | 0 | Nova Scotia | 1 | 0.5 | 0 | Nunavut | 1 | 0.5 | 0 | Ontario | 1 | 0.5 | 0 | Prince Edward Island | 1 | 0.5 | 0 | Quebec | 1 | 0.5 | 0 | Saskatchewan | 1 | 0.5 | 0 | Yukon | 1 | 0.5 | 0 | 15 | | |
| Province | | Kilometre Rate Percentage Difference | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | < ±5.0% | ±5.0%- ±10.0% | > ±10.0% | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Alberta | 1 | 0.5 | 0 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| British Columbia | 1 | 0.5 | 0 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Manitoba | 1 | 0.5 | 0 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| New Brunswick | 1 | 0.5 | 0 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Newfoundland and Labrador | 1 | 0.5 | 0 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Northwest Territories | 1 | 0.5 | 0 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Nova Scotia | 1 | 0.5 | 0 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Nunavut | 1 | 0.5 | 0 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Ontario | 1 | 0.5 | 0 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Prince Edward Island | 1 | 0.5 | 0 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Quebec | 1 | 0.5 | 0 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Saskatchewan | 1 | 0.5 | 0 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Yukon | 1 | 0.5 | 0 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| TOTALS | 100 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

APPENDIX C

7.3 Mandatory Compliance Checklist

- Submission Deadline* *Section 2.3.1*
- Offering Period* *Section 2.7*
- Proponent's Qualifications* *Section 4.5*
- Response to Statement of Work* *Section 4.6*
- Project Management Plan* *Section 4.7*
- Pricing Proposal* *Section 4.10*
 - Table 7.** *Overhead Percentage*
 - Table 8.** *Transition Plan (One Time Cost)*
 - Table 9.** *Other Costs*
 - Table 10.** *Proponent Average Hourly Rates by Years of Experience and Job Title*
 - Table 11.** *Proponent Kilometre Rates*
- 7.1 Certificate of Submission* *(Section 7 Appendices, Appendix A)*

APPENDIX D

7.4 Census Metropolitan Areas (CMA), Census Agglomerations (CA) and Municipalities by Population

Table I. *Census Metropolitan Areas (CMA) with a Population of 100,000+*

| Name | CMHC Code | CMA* Code |
|---|------------------|------------------|
| Abbotsford - Mission | 0110 | 932 |
| Barrie | 0120 | 568 |
| Brantford | 0125 | 543 |
| Calgary | 0140 | 825 |
| Saguenay | 0180 | 408 |
| Edmonton | 0340 | 835 |
| Guelph | 0460 | 550 |
| Halifax | 0580 | 205 |
| Hamilton | 0610 | 537 |
| Kelowna | 0670 | 915 |
| Kingston | 0700 | 521 |
| Kitchener - Cambridge - Waterloo | 0850 | 541 |
| London | 0950 | 555 |
| Moncton | 1040 | 305 |
| Montréal | 1060 | 462 |
| St. Catharines - Niagara | 1160 | 539 |
| Oshawa | 1250 | 532 |
| Gatineau | 1264 | 505 |
| Ottawa | 1265 | 505 |
| Peterborough | 1320 | 529 |
| Québec | 1400 | 421 |
| Regina | 1490 | 705 |
| Saint John | 1600 | 310 |
| St. John's | 1640 | 001 |
| Saskatoon | 1700 | 725 |
| Sherbrooke | 1800 | 433 |
| Greater Sudbury / Grand Sudbury | 2000 | 580 |
| Thunder Bay | 2240 | 595 |
| Toronto | 2270 | 535 |
| Trois-Rivières | 2320 | 442 |
| Vancouver | 2410 | 933 |
| Victoria | 2440 | 935 |
| Windsor | 2640 | 559 |
| Winnipeg | 2680 | 602 |

Note*: *Census metropolitan area (CMA) is an area consisting of one or more neighbouring municipalities situated around a core. A census metropolitan area must have a total population of at least 100,000 of which 50,000 or more live in the core.*

Table 2. *Census Agglomerations (CA) with a Population of 50,000+*

| Name | CMHC Code | CA code |
|---------------------------------|------------------|----------------|
| Belleville | 3250 | 522 |
| Brandon | 3275 | 610 |
| Charlottetown | 3300 | 105 |
| Chatham-Kent | 3320 | 556 |
| Chilliwack | 3380 | 930 |
| Cornwall | 3420 | 501 |
| Courtenay | 3460 | 943 |
| Drummondville | 3540 | 447 |
| Fredericton | 3680 | 320 |
| Granby | 3800 | 450 |
| Grande Prairie | 3920 | 850 |
| Kamloops | 4220 | 925 |
| Kawartha Lakes | 4230 | 530 |
| Lethbridge | 4340 | 810 |
| Medicine Hat | 4390 | 805 |
| Nanaimo | 4460 | 938 |
| Norfolk | 4490 | 547 |
| North Bay | 4510 | 575 |
| Prince George | 4900 | 970 |
| Red Deer | 4940 | 830 |
| Rimouski | 4970 | 404 |
| Saint-Hyacinthe | 5000 | 452 |
| Saint-Jean-sur-Richelieu | 5100 | 459 |
| Sarnia | 5250 | 562 |
| Sault Ste. Marie | 5280 | 590 |
| Shawinigan | 5400 | 444 |
| Cape Breton | 5560 | 225 |
| Vernon | 5700 | 918 |
| Wood Buffalo | 5800 | 860 |

Table 3. Census Agglomerations (CA) with a Populations between 10,000 to 49,999

| Name | CMHC code | CA* code |
|---------------------|------------------|-----------------|
| Alma | 7035 | 410 |
| Amos | 7040 | 481 |
| Baie-Comeau | 7045 | 406 |
| Bathurst | 7075 | 328 |
| Bay Roberts | 7077 | 005 |
| Brockville | 7090 | 512 |
| Brooks | 7095 | 806 |
| Campbell River | 7100 | 944 |
| Campbellton | 7120 | 330 |
| Camrose | 7123 | 833 |
| Canmore | 7124 | 828 |
| Centre Wellington | 7127 | 531 |
| Cobourg | 7165 | 527 |
| Collingwood | 7170 | 567 |
| Corner Brook | 7175 | 015 |
| Cowansville | 7183 | 437 |
| Cranbrook | 7185 | 905 |
| Dawson Creek | 7190 | 975 |
| Dolbeau-Mistassini | 7195 | 411 |
| Duncan | 7225 | 937 |
| Edmundston | 7240 | 335 |
| Elliot Lake | 7245 | 582 |
| Estevan | 7253 | 750 |
| Fort St. John | 7265 | 977 |
| Cold Lake | 7292 | 845 |
| Grand Falls-Windsor | 7300 | 010 |
| Temiskaming Shores | 7315 | 584 |
| Hawkesbury | 7330 | 502 |
| High River | 7331 | 821 |
| Ingersoll | 7333 | 533 |
| Joliette | 7345 | 456 |
| Kenora | 7360 | 598 |
| Kentville | 7375 | 210 |
| Lachute | 7420 | 468 |
| Lacombe | 7422 | 832 |
| Leamington | 7429 | 557 |
| Lloydminster | 7433 | 840 |
| Matane | 7440 | 403 |
| Midland | 7465 | 571 |
| Miramichi | 7467 | 329 |
| Moose Jaw | 7480 | 715 |
| New Glasgow | 7510 | 220 |

| | | |
|--------------------------|------|-----|
| North Battleford | 7525 | 735 |
| Okotoks | 7527 | 820 |
| Orillia | 7529 | 569 |
| Owen Sound | 7537 | 566 |
| Parksville | 7539 | 939 |
| Pembroke | 7540 | 515 |
| Penticton | 7550 | 913 |
| Petawawa | 7555 | 516 |
| Portage la Prairie | 7560 | 607 |
| Port Alberni | 7570 | 940 |
| Port Hope | 7572 | 528 |
| Powell River | 7574 | 945 |
| Prince Albert | 7579 | 745 |
| Prince Rupert | 7581 | 955 |
| Quesnel | 7583 | 952 |
| Rivière-du-Loup | 7590 | 405 |
| Rouyn-Noranda | 7600 | 485 |
| Saint-Georges | 7615 | 428 |
| Salmon Arm | 7617 | 920 |
| Sept-Îles | 7650 | 412 |
| Sorel-Tracy | 7675 | 454 |
| Squamish | 7680 | 934 |
| Steinbach | 7683 | 605 |
| Stratford | 7685 | 553 |
| Strathmore | 7688 | 826 |
| Summerside | 7690 | 110 |
| Swift Current | 7700 | 720 |
| Sylvan Lake | 7702 | 831 |
| Terrace | 7705 | 965 |
| Thetford Mines | 7720 | 430 |
| Thompson | 7730 | 640 |
| Tillsonburg | 7733 | 546 |
| Timmins | 7734 | 586 |
| Truro | 7765 | 215 |
| Val-d'Or | 7780 | 480 |
| Salaberry-de-Valleyfield | 7795 | 465 |
| Victoriaville | 7825 | 440 |
| Wetaskiwin | 7838 | 865 |
| Whitehorse | 7840 | 990 |
| Williams Lake | 7845 | 950 |
| Woodstock | 7855 | 544 |
| Yellowknife | 7860 | 995 |
| Yorkton | 7865 | 710 |

Note*: Census agglomeration (CA) is an area consisting of one or more neighbouring municipalities situated around a core. A census agglomeration must have a core population of at least 10,000. The census agglomerations highlighted in yellow correspond to exception areas.

Table 4. *Municipalities with a Population of 10,000+*

| Name | CMHC Code | CSD Code |
|---------------------------------------|------------------|-----------------|
| Bonnyville No. 87 MD | 6030 | 4812004 |
| Bracebridge T | 6035 | 3544018 |
| Brighton MU | 6046 | 3514004 |
| Brock TP | 6048 | 3518039 |
| Trent Hills MU | 6057 | 3514045 |
| Capital F RDA | 6067 | 5917027 |
| Chester MD | 6075 | 1206009 |
| Clearwater County MD | 6087 | 4809002 |
| East Hants MD | 6153 | 1208008 |
| Erin T | 6157 | 3523017 |
| Essex T | 6163 | 3537016 |
| Foothills No. 31 MD | 6168 | 4806001 |
| Haldimand County CY | 6175 | 3528018 |
| Gander T | 6179 | 1006009 |
| Gaspé V | 6185 | 2403005 |
| Gravenhurst T | 6195 | 3544002 |
| Grande Prairie County No. 1 MD | 6201 | 4819006 |
| Greater Napanee T | 6205 | 3511015 |
| Hanover RM | 6225 | 4602041 |
| Huntsville T | 6230 | 3544042 |
| Kincardine MU | 6245 | 3541024 |
| Kings, Subd. A SC | 6260 | 1207001 |
| Lacombe County MD | 6288 | 4808022 |
| Lac Ste. Anne County MD | 6289 | 4813001 |
| La Tuque V | 6293 | 2490012 |
| Lambton Shores MU | 6295 | 3538040 |
| Les Îles-de-la-Madeleine MÉ | 6298 | 2401023 |
| Lunenburg MD | 6332 | 1206001 |
| Mackenzie County SM | 6335 | 4817095 |
| Marieville V | 6338 | 2455048 |
| Meaford MU | 6345 | 3542047 |
| Montmagny V | 6370 | 2418050 |
| Mississippi Mills T | 6382 | 3509030 |
| Mont-Laurier V | 6386 | 2479088 |
| Mountain View County MD | 6400 | 4806028 |
| Nelson CY | 6415 | 5903015 |
| North Grenville MU | 6423 | 3507065 |
| North Perth MU | 6427 | 3531040 |
| Prévost V | 6495 | 2475040 |
| Prince Edward County CY | 6505 | 3513020 |
| Queens RGM | 6506 | 1204010 |
| Rawdon MÉ | 6508 | 2462037 |
| Red Deer County MD | 6521 | 4808001 |

| | | |
|---|------|---------|
| Roberval V | 6525 | 2491025 |
| Sainte-Adèle V | 6528 | 2477022 |
| Sainte-Agathe-des-Monts V | 6529 | 2478032 |
| Sainte-Sophie MÉ | 6531 | 2475028 |
| Saint-Félicien V | 6533 | 2491042 |
| St. Andrews RM | 6535 | 4613043 |
| Saint-Lin--Laurentides V | 6538 | 2463048 |
| Sainte-Marie V | 6543 | 2426030 |
| Saugeen Shores T | 6548 | 3541045 |
| Scugog TP | 6552 | 3518020 |
| Summerland DM | 6570 | 5907035 |
| The Nation / La Nation M | 6583 | 3502025 |
| Wasaga Beach T | 6621 | 3543064 |
| West Nipissing / Nipissing Ouest M | 6623 | 3548055 |
| West Grey MU | 6627 | 3542004 |
| West Hants MD | 6628 | 1208001 |
| Wetaskiwin County No. 10 MD | 6632 | 4811001 |
| Yarmouth MD | 6634 | 1202004 |
| Yellowhead County MD | 6635 | 4814003 |
| Weyburn CY | 6850 | 4702047 |
| Winkler CY | 6866 | 4603050 |

Note*: Census subdivision (CSD) is an area that is a municipality or an area that is deemed to be equivalent to a municipality for statistical reporting purposes. The municipalities highlighted in yellow correspond to exception areas.

APPENDIX E

7.5 Mandatory Requirements

As Stated in Section 3.3.4: Mandatory Requirements, to qualify as an eligible proponent, a proponent must meet the following requirements. All references to bilingual refer to English and French.

| Mandatory Requirement | Yes | Comments |
|--|--------------------------|----------|
| Provide surveys enumeration services for Starts and Completions Survey, Market Absorption Survey, as well as interviewing and data entry services for the, Rental Market Survey, Condo Vacancy Survey and the Seniors' Housing Survey. | <input type="checkbox"/> | |
| Hire the personnel required in all the centres identified in Appendix D to provide the surveys enumeration services. | <input type="checkbox"/> | |
| Hire the personnel required in Halifax, Montreal, Ottawa, Toronto, Calgary and Vancouver to provide the interviewing and data entry services. | | |
| Hire existing CMHC personnel which will be identified in the resulting contract. | <input type="checkbox"/> | |
| Existing CMHC employees currently providing the services must be compensated same hourly rate and kilometre rates. | <input type="checkbox"/> | |
| Proponent's time and travel system is bilingual. | <input type="checkbox"/> | |
| The system for recording the time and travel must be bilingual and be able to record: | <input type="checkbox"/> | |

| | | |
|--|--------------------------|--|
| <ul 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> | | |
| <p>Personnel must be compensated for the hours and kilometres traveled in provision of the services.</p> | <input type="checkbox"/> | |
| <p>All contacts with CMHC's personnel available in both English and French.</p> | <input type="checkbox"/> | |
| <p>All contacts with proponent's personnel for the enumeration, interviewing and data entry services available in both English and French.</p> | <input type="checkbox"/> | |
| <p>Ensure that all proponent's personnel and subcontractor staff achieve and maintain the required level of security clearance and background checks.</p> | <input type="checkbox"/> | |
| <p>CMHC will have the opportunity to hire the employees providing the services immediately after the expiry of, or termination of, the contract at no cost to CMHC.</p> | <input type="checkbox"/> | |
| <p>Proponent support to CMHC must be offered Monday to Friday from 8am to 6pm EST (excluding statutory holidays).</p> | <input type="checkbox"/> | |

Proponent support regarding non-CMHC subject matter to proponent personnel performing the enumeration, interviewing and data entry services must be offered Monday to Friday from 8am to 6pm EST (excluding statutory holidays).

APPENDIX F

7.6 Rated Requirements

When responding, the proponent must number the responses to match the numbering of the questions.

I. Proponent's Qualifications

- 1.1. Provide a description of the proponent's organization, its history, legal status, number of full-time employees and areas of specialization.
- 1.2. Provide 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.
- 1.3. Provide 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?
- 1.4. Provide an organization chart for CMHC account showing, at a minimum, the following:
 - a) The number of resources directly involved in service delivery, including the number and where services are being provided by subcontractors and/or strategic partners.
 - b) For each position: titles and job level; whether they are onsite or offsite (location if off-site); fully/partially dedicated (indicate allocation if they are partially dedicated); whether they are bilingual.
 - c) For support services: details on the level of effort being provided and the types of resources allocated to this account, a brief explanation of the services being provided, profile or resume of the leader of the service (1/2 page summary) and key benefits to CMHC.
 - d) Describe if the structure is used on other accounts and what have been the primary benefits and how will this be a benefit to CMHC.
- 1.5. Describe your plans for staffing the portfolio, including:
 - a) Provide a profile for the key positions (indicate at a minimum key functions, experience and qualifications)
 - b) Explain the rationale for the number of positions and organization structure.
 - c) Describe the direct interfaces with CMHC and occupants.
 - d) Provide the résumés for at a minimum the key personnel, including subcontractors, if any.
- 1.6. Describe your backup process to ensure continuity in the event of illness, vacation and vacancies, including an orderly transfer of knowledge and a smooth transition to the new employee.
- 1.7. Describe your compensation package and how it compares to industry norms, including salary, incentive plans, benefits and other employee programs. Provide the following documentation:
 - a) Sample employee package

- b) Hourly pay rate by job title and the years of experience for employees not transitioned from CMHC.
The proponent must complete Table 10B in Section 4.10: Pricing Proposal.
 - c) Kilometre rates by province for employees not transitioned from CMHC.
The proponent must complete Table 11B in Section 4.10: Pricing Proposal.
 - d) Vacation policy
 - e) Salary indexation
 - f) General benefits (health, dental, etc.)
 - g) Retirement plan (if any)
- 1.8. Describe your existing policies and procedures for pre-employment security screening including criminal history checks and reference checks and how you would customise it to meet CMHC's requirements.
- 1.9. Describe your problem management methodology, including tracking, notification, escalation and resolution processes.
- 1.10. Describe the competitive advantage and the areas where you believe you can drive the most value including any other unique approaches you will use for CMHC's portfolio as part of the services.
- 1.11. Describe how you propose to cover the regular business hours for providing services support across Canada.

2. Strategic Sourcing

- 2.1. Provide the number of subcontractors required to perform the services.
- 2.2. List all services that will be subcontracted in CMHC's portfolio and:
- a) Whether this is consistent with your other accounts;
 - b) The reasons for subcontracting the service; and
 - c) Precious years working experience with the subcontractors.

3. Transition

- 3.1. Describe past transitions of similar scope and size including the following:
- a) Describe how the information and data has been transferred on previous transitions and how that would compare to the transition that you are planning for CMHC. Please include the company name in your response and include this company in your reference list in Appendix F Section 1.2: Proponent's Qualifications.
 - b) Provide the percentage and number of staff who were transitioned from your clients or another incumbent service provider to make up the teams on at least three mandates transitioned in the past five years.
- 3.2. Provide a detailed transition plan
- a) Describe key features of the plan.
 - b) Provide a GANTT chart with milestone dates and deliverables, clearly illustrating the effective date and start date, major work streams and supporting transition details.
- 3.3. Describe your transition project team.
- a) Provide a transition project team organization chart showing suggested CMHC interfaces.
 - b) Provide resumes of the transition project team members and profiles of the positions.

- c) Describe the anticipated role of the CMHC team and the expected level of effort required from CMHC.
- 3.4. Further to Schedule D: Human Resources, would you consider hiring CMHC employees currently working as, enumerators, data entry clerk and interviewers?
- 3.5. Describe the process that you will be using if there are CMHC personnel transitioning including:
 - a) Describe the process that you will take to decide which personnel to transition;
 - b) Interview process;
 - c) Communication strategy;
 - d) Onboarding, training and orientation processes;
 - e) Compensation (rates of pay, kilometre rates and vacation pay, etc.);
 - f) Measures taken to escalate and address issues; and
 - g) Other relevant practices.
- 3.6. Describe how you will ensure the transition resources remain available throughout the transition period.
- 3.7. Describe how you will develop the policies and procedures associated with the CMHC account, including the following:
 - a) A full list of the policies and procedures that will be developed;
 - b) Whether you have existing source documents that can be used as the base document; and
 - c) How they will be kept up to date.
- 3.8. Describe the process that you used to transition-out of an outsourcing agreement, including the lessons learned.
- 3.9. Describe your process for the transfer of knowledge from the CMHC team to your team.

4. Service Requirements

- 4.1. Provide detailed information relative to the specifications listed in Schedule A: Statement of Work. The proponent should demonstrate a clear understanding of the objectives and requirements from the Statement of Work. Please provide a detailed response for each of the sections listed below:
 - 1) Survey Conduct;
 - 2) Delivery Organization;
 - 3) Communications;
 - 4) Management interfaces;
 - 5) Reports;
 - 6) Quality Management
 - 7) Subcontractor Management
 - 8) Business Continuity and Disaster Recovery Planning
 - 9) Records Management
 - 10) Transition
 - 11) Transition Out- Hand Back
- 4.2. Time and Travel

- a) Describe the time and travel system that will be used to record the time and travel of the employees.
 - b) Describe any customizations that will be performed to the time and travel system to meet the service requirements.
- 4.3. Describe any information management system features or functionality that will be provided to CMHC in addition to those that meet the service requirements at no additional cost to CMHC.
- 4.4. The services can fluctuate significantly due to the volume of activity in the housing market. Likewise, CMHC may increase or decrease the scope of the survey to reflect the demand in the market. Please describe your ability to adjust quickly and efficiently according to workload changes.

5. Project Management Plan

- 5.1. *Project Management Approach.* The proponent shall describe its project management approach and the project management organizational structure including reporting levels and lines of authority.
- 5.2. *Quality Control.* The proponent shall describe its approach to quality control for the provision of the reports (Schedule E: Reports) including:
- details of the methods used in ensuring quality of the work,
 - response mechanisms in the case of errors, omissions, delays, etc.,
 - describe how your approach will evolve to meet CMHC's evolving needs and to foster continuous improvement.
- 5.3. *Status Reporting to CMHC.* The proponent shall describe its status reporting methodology, including details of written and oral progress reporting methods.
- 5.4. *Work Schedule.* The proponent shall describe the method it will use to ensure compliance with the work schedule.
- 5.5. *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.
- 5.6. The proponent's plan for ensuring continuous improvement of its practices and procedures for delivering the services.
- 5.7. The proponent's plan to ensure the availability of qualified proponent personnel to perform the services as well as the proponent's plan to minimize personnel turnover.