



REQUEST FOR EXPRESSION OF INTEREST

FOR

Property and Sales Data for Multi-Residential Rental Properties

Date issued: July 11, 2017

Solicitation Closes: July 25, 2017

*Solicitation File Number:
REOI-2017-01*

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Housing Corporation*

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SECTION I GENERAL INFORMATION

1.1 Introduction and Scope

The Canada Mortgage and Housing Corporation (CMHC) is inviting vendors (hereafter referred to as “proponents”) to respond to this Request for Expression of Interest (REOI) for the purpose of creating a shortlist of proponents to participate in a potential procurement process.

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

In this REOI, general specifications can be found in Section 3 of this REOI.

1.2 CMHC Background

CMHC is the Government of Canada’s National Housing Agency, with a mandate to help Canadians meet their housing needs. 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 more than 2,000 employees located at its National Office in Ottawa, and at various Business Centers throughout Canada. The Business Center areas are divided into five regions: Atlantic; Quebec; Ontario; British Columbia; and Prairies & Territories.

1.3 Description of REOI Process

This REOI process is the first stage of a potential two-stage solicitation process. A proponent’s response to this REOI is called an Expression of Interest (EOI).

EOI responses received in response to this REOI will be evaluated in accordance with the criteria established in the evaluator’s worksheet attached hereto as Appendix A. Those proponents who are successful in meeting all requirements, and obtaining the minimum score or higher in each category may be shortlisted and, may be invited to participate further in the procurement process.

All information supplied by a proponent in its EOI response will be considered as part of the whole two-stage solicitation process. In response to the subsequent procurement process, each shortlisted proponent will be required at that time to validate that the information supplied in its EOI response remains true or to document any changes.

1.4 Schedule of Events

The following schedule summarizes significant target events for the REOI process. The dates may be changed by CMHC at its sole discretion and shall not become conditions of any subsequent solicitation process which may be entered into by CMHC and the selected proponent(s).

<i>Date</i>	<i>Activities</i>
<i>July 11, 2017</i>	<i>REOI issued</i>
<i>July 25, 2017</i>	<i>Expression of Interest (EOI) deadline</i>
<i>August 2017</i>	<i>Evaluation and selection of shortlisted proponents</i>
<i>September 2017</i>	<i>Announcement of successful shortlisted proponents</i>
<i>September 2017</i>	<i>Debriefing of unsuccessful proponents, as requested</i>

1.5 Procurement Policy Re: The Environment

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

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

The Contracting Authority may authorize preferential pricing of up to ten percent for the purchase of more environmentally sound commodities.

1.6 Proponent Feedback

CMHC aims to continuously improve its Request for Expression of Interest (REOI) documents and procedures. CMHC welcomes input regarding proponent experience in responding to its REOI whether as a compliment or suggestion for future improvements.

*Proponent may submit comments labeled as **Proponent Feedback REOI # REOI-2017-01** to the name and address provided in sub-section 2.2.*

As CMHC does not wish to be perceived as influenced by such feedback in the shortlisting decision, proponents are requested to submit their feedback after the shortlisting has been announced.

Any proponent who notes a material flaw in the REOI that could affect the outcome should report it as specified in sub-section 2.2.

SECTION 2 EXPRESSION OF INTEREST (EOI)

2.1 Delivery Instructions and Deadline (by E-bid)

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

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

Upon receipt of EOI responses, an automated confirmation will be issued to the sender's e-mail address. It is strongly recommended that proponents follow up with the inquiries person named in Section 2.2 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 for proposals to be received.**

Address for Delivery

EOI responses, 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: REOI, file # REOI-2017-01

Format

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

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

EOI response Opening and Verification Period

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

Submission Deadline

A REOI response must be received at the exact location as specified above before the submission deadline set as:

2:00 p.m. Local Ottawa time, on July 25, 2017 at 2:00 pm EDT, Ottawa local time

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

2.2 Inquiries

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

*Camille Attia, Procurement Advisor
Tel: (613) 748-5332
Email: cattia@cmhc-schl.gc.ca*

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

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

In the event that it becomes necessary to revise any part of the REOI as a result of any inquiry or for any other reason, an addendum to this REOI will be provided to each proponent to whom CMHC has issued this REOI.

2.3 Communication

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

2.4 Proponent Contact

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

2.5 Changes to Expression of Interest

Changes to the submitted EOI can be made, if required, provided they are received as an addendum to, or clarification of, previously submitted EOI, or as a complete new REOI to cancel and supersede the earlier EOI. The addendum, clarification, or new EOI must be submitted as per the delivery instructions

outlined in Section 2.1, be clearly marked **“REVISION”**, and be received no later than the submission deadline. In addition, the REVISION must include a description of the degree to which the contents are in substitution for the earlier EOI.

2.6 Liability for Errors

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

2.7 Verification of Proponent’s Response

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

2.8 Ownership of Responses

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

All information regarding the terms and conditions, financial and/or technical aspects of the proponent's Expression of Interest, which, in their opinion, are of a proprietary or confidential nature, must be clearly marked **“PROPRIETARY”** or **“CONFIDENTIAL”** at each item or at the top of each page. Proponents’ documents and information so marked will be treated accordingly by CMHC. Notwithstanding the foregoing, proponents are advised that as a Crown corporation, CMHC is subject to the federal legislation with respect to access to information and privacy. Information submitted by third parties will be protected or may be required to be disclosed in specific circumstances pursuant to the federal legislation.

2.9 Proprietary Information

Information contained in this REOI is to be considered “Proprietary Information” and the proponent is not to disclose this information to any party other than the proponent’s employees or agents participating in the response to this REOI.

2.10 Declaration re: Gratuities

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

2.11 Conflict of Interest

The proponent, the company, the registered principals and officers, and employees of the company are to declare any potential conflict of interest between themselves or their employees and CMHC or its employees.

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

2.12 Joint Venture Responses

Joint venture proposals should adequately represent and communicate the proposed participation and responsibilities of each company in the joint venture, and must provide a description of the proposed joint venture business arrangement which would be entered into by all parties upon receipt of a contract. The description must list the companies involved, indicate how long the business arrangement has been in existence, indicate the service(s) each respective party would be providing and describe the proposed participation and responsibility of each party.

Proponents must designate one of the partners as the contact person through whom any communication between the proponent and CMHC will be channeled during the REOI process.

SECTION 3 REOI STATEMENT OF WORK

3.1 Pre-qualification Questionnaire

CMHC is carrying out this REOI to prequalify service provider(s) interested in providing recent property data and information on multi-residential rental properties involving 6 units and more. CMHC seeks to reach out to Real Estate firms, appraisal firms, property management firms or any data providers who can offer property and sales information including but not limited to income, expenses, building characteristics, unit breakdown and cap rates.

The objective of this REOI is to:

- a. Prequalify vendors who are capable of providing the above noted services;
- b. Determine geographical regions in Canada or areas where Real Estate firms, appraisal firms, property management firms or any other data providers are able to provide CMHC on a quarterly or more frequent basis with information on properties that were the subject of a recent sale (within 12 months) or that are currently listed for sale; and
- c. Determine what the fee structure might be for this type of information request.

3.2 Property and sales data, and/or listings information

Describe your company’s ability to provide all or some of the following property and sales data, and/or listings information.

Following are the data fields that are requested and that should be included in the responses to this REOI however if the proponent is unable to provide all fields, please include the fields that are available and any additional data that may not be listed below:

- a. Property address: civic number, legal description or lot number, street name, municipality, province, postal code, geo codes
- b. Residential unit breakdown

Type	Number of units	Average area (Sq. ft.)	Average rent
1bd			
2bd			
3 bd			
4 bd+			

- c. Current Rent roll
- d. Laundry revenue
- e. Commercial space revenue and breakdown
- f. Parking revenue

- g. Services included in rent (i.e. heat, water, cable)*
- h. Current Expenses*
 - i. Insurance*
 - ii. Hydro*
 - iii. Gas*
 - iv. Maintenance & repair*
 - v. Resident caretaker*
 - vi. Property management*
 - vii. License and permit*
 - viii. Water, Sewer and Garbage (if applicable)*
 - ix. Other (provide details)*
- i. Municipal property taxes and assessment*
- j. Building description (i.e. number of buildings in project, number of storeys, building type, age, parking structure, balconies, etc.)*
- k. Occupancy type (i.e. residential, retirement home, long term care, student housing, etc.)*
- l. Improvement / renovations*
- m. Date of sale*
- n. Sale price – Sold price*
- o. Registry number*
- p. Pictures*
- q. Name of purchaser (if possible but not for the purpose of contacting the individual)*
- r. Name of vendor (if possible but not for the purpose of contacting the individual)*
- s. Other relevant information*

3.3 Methodology

- a. Describe in detail the processes, methodology and sources to gather information requested, especially income and expenses; and*
- b. Identify the geographical regions in Canada or specific area that your company would be able to cover. Provide approximate turn-around times.*

3.4 Proponent Qualification

- a. Provide company structure; and*
- b. Employee qualifications and relevant experience.*

3.5 Fee Structure

- a. Propose a fee structure for the data acquisition. Describe whether it would be based on subscription, number of users, or other.*

SECTION 4 REOI REQUIREMENTS

4.1 Overview of Section 4

EOI 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.

<i>Section</i>	<i>Response Item</i>
<i>4.2</i>	<i>Covering Letter</i>
<i>4.3</i>	<i>Table of Contents</i>
<i>4.4</i>	<i>Executive Summary</i>
<i>4.5</i>	<i>Response to Pre-qualification Questionnaire</i>
<i>4.6</i>	<i>Project Management Plan</i>
<i>4.7</i>	<i>Other Information</i>

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

Requirements for each Response Item are detailed below.

4.2 Covering Letter

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

- a. A description of the company or joint venture/consortium;*
- b. The names of the principals;*
- c. The primary contact person with respect to this REOI: the individual's name, address, contact numbers by phone and fax, and contact e-mail address; and*
- d. The locations of primary and all other offices that would be servicing the contract.*

4.3 Table of Contents

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

4.4 Executive Summary

The proponent's REOI response should include an executive summary including a brief statement of the proponent's qualifications to meet the need of CMHC.

4.5 Response to Pre-qualification Questionnaire

In this section, the proponent should provide detailed information relative to the questions listed in section 3, REOI pre-qualification questionnaire.

4.6 Project Management Plan

The proponent shall describe its project management plan including:

- a. Project Management Approach. The proponent shall describe its project management approach and the project management organizational structure including reporting levels and lines of authority;*
- b. Quality Control. The proponent shall describe its approach to quality control including:*
 - Quality assurance process to monitor the quality of the information provided including how the information is validated and confirmed*
 - 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; and*
- d. Interface with CMHC. The proponent shall describe and explain*
 - its interface points with CMHC*
 - all interface mechanisms*
 - how interface issues and difficulties will be resolved.*

4.7 Other Information

Any other information a proponent wishes to provide should be place in this section.

SECTION 5 EVALUATION AND SELECTION

5.1 Overview of Section 5

Section 5 describes the process CMHC will use to evaluate REOI responses and shortlist proponents.

The selection of proponents to participate in a subsequent procurement process shall be at the sole discretion of CMHC. CMHC reserves the right to accept or reject any or all responses to this REOI.

CMHC shall conduct the REOI process in a visibly fair manner and will treat all proponents equitably. To this end, it has established objective REOI standards and evaluation criteria which will be applied uniformly to all proponents. Therefore, no proponent shall have any cause of action against CMHC arising out of a failure to shortlist, the failure to evaluate any REOI response, or the methods by which proposals are assessed.

5.2 Evaluation Methodology

Each compliant EOI response shall be evaluated by an Evaluation Team made up of qualified personnel. The team shall evaluate and numerically score each EOI response in accordance with the evaluation criteria as shown in the Evaluator's Worksheet attached as Appendix 'A' to this REOI.

An EOI response must meet the minimum upset score in each category (as shown on the Evaluator's Worksheet) to remain in the evaluation.

Each compliant EOI response that meets the minimum upset scores in each category shall be deemed to have passed the evaluation process and will be shortlisted.

5.3 Evaluator's Worksheet

The Evaluator's Worksheet as provided in Appendix "A" lists all the criteria upon which each REOI response will be evaluated. The criteria are based on the requirements as provided in this REOI.

SECTION 6 APPENDICES

APPENDIX A

6.1 Evaluation Table

EVALUATION CRITERIA	A	B	C	D
	WEIGHT 100 Total	POINTS 1 to 5	UPSET SCORE	SCORE AxB
Understanding of the project; information/data fields available; Geographical area covered	20		60	
Methodology used to gather the requested information	35		105	
Project Management Plan for the project Frequency of information Reliability/accuracy of information Processes to ensure reliable data	30		90	
Qualifications and Experience Sources of Information	15		45	
TOTALS	100			