



# REQUEST FOR STANDING OFFER

FOR

Housing Research Services

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Housing Needs Research

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## **1 SECTION 1 GENERAL INFORMATION**

### **1.1 Overview of Section 1**

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

### **1.2 Introduction and Scope**

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

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

### **1.3 CMHC Background**

CMHC is the Government of Canada’s National Housing Agency, with a mandate to help Canadians gain access to a wide choice of quality, affordable homes. It is a Crown corporation, with a Board of Directors, reporting to Parliament through the Minister of 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 people located at its National Office in Ottawa, and at various Business Centres throughout Canada. The Business Centre areas are divided into five regions: Atlantic; Quebec; Ontario; British Columbia; and Prairies & Territories.

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

### **1.4 Purpose of Request for Standing Offers (RFSO)**

CMHC will use this Request for Standing Offer (RFSO) to retain a source list of professional services to CMHC’s Policy, Research and Public Affairs in three housing research areas: Socio-Economic, Technical and Market Analysis/Finance. Qualified offerors are to provide the goods and/or services outlined herein on an “as-and-when requested” basis. In a RFSO process, offers and offerors are qualified in terms of ability to satisfy the stated mandatory criteria, while also providing pricing for the goods and/or services that will be provided to CMHC.

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

## 1.5 Schedule of Events

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

<b>Date</b>	<b>Activities</b>
January 24, 2018	Request for Standing Offer (SO) issued
February 14, 2018	Submission of questions deadline
February 28, 2018	Offer Submission deadline
March 2018	Evaluation and selection of Standing Offer (SO) holders
April 2018	Inform successful SO holders
As requested	Debriefing of unsuccessful SO offerors as requested

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

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

## 1.7 RFSO Potential Service Providers

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

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

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

## 1.8 Income Tax Reporting Requirement

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

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

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

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

The evaluation methodology in section 5 fully describes any environmental preferences associated with this procurement.

### **1.10 Call-ups Against a Standing Offer**

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

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

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

The Offeror may accept or decline the assignment.

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

### **1.11 Quantity**

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

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

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

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

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

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

### **2.2 Certificate of Submission**

#### **Mandatory**

The Certificate of Submission, Appendix A, summarizes some of the mandatory requirements set out in the RFSO. All offeror offers Must include a Certificate of Submission (or an accurate reproduction) signed by the offeror.

Offerors Must submit a signed Certificate of Submission as part of their offer. Should an offeror not include the signed Certificate of Submission the offeror will be notified by CMHC and given 48 hours in which to meet this requirement.

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

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

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

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

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

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

### **Address for Delivery**

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

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

**The subject line of the transmission must state: RFSO, file # 201703889**

### **Format**

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

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

### **Offer Opening and Verification Period**

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

### **Offer Submission Deadline**

### **Mandatory**

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

***2:00 p.m. local Ottawa time, on February 28, 2018***

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

## **2.4 Inquiries**

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

*Camille Attia*  
*Senior Procurement Advisor*  
*cattia@cmhc.ca*

Information given verbally by any person within CMHC shall not be binding upon CMHC. Offerors must have written confirmation from CMHC for any changes, alterations, etc., concerning this RFSO. CMHC cannot guarantee a reply to inquiries received later than February 14, 2018.

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



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

## **2.5 Communication**

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

## **2.6 Offeror Contact**

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

## **2.7 Offering Period**

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

## **2.8 Changes to Offer**

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

## **2.9 Liability for Errors**

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

## **2.10 Verification of Offeror’s Offer**

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

## **2.11 Ownership of Offers**

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

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

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

## **2.12 Proprietary Information**

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

## **2.13 Corporation Identification**

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

## **2.14 Declaration re: Gratuities**

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

## **2.15 Conflict of Interest**

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

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

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

## **2.16 Declaration re: Bid Rigging and Collusion**

In submitting its offer, the Offeror certifies that:

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

## **2.17 Intellectual Property Rights**

- a) For the purpose of this RFSO, Intellectual Property shall include all information, materials, reports and other work product produced under any Call-up resulting from this Standing Offer.
- b) CMHC shall retain all rights which it holds in any pre-existing Intellectual Property and shall be the sole owner of all rights in any Intellectual Property developed in the course of the Work, irrespective of the manner in which the Intellectual Property comes into existence (hereinafter referred as « CMHC Intellectual Property»). The Standing Offer Holder agrees to acknowledge CMHC's rights in the CMHC Intellectual Property upon request by CMHC.
- c) The Standing Offer Holder shall have no right in the CMHC Intellectual Property except as may be granted in writing by CMHC. The Standing Offer Holder shall not divulge, release, copy, modify or publish the CMHC Intellectual Property without the prior written consent of CMHC.
- d) Nothing in this Agreement shall affect the ownership of any pre-existing Intellectual Property rights in any tools, methodologies, databases and materials used to produce the CMHC Intellectual Property.
- e) Where a Subcontractor may create CMHC Intellectual Property in the course of the Work, the Standing Offer Holder is solely responsible for ensuring that all rights in the Intellectual Property are transferred to CMHC in compliance with clause 8.2 above.

- f) In the event the Standing Offer Holder intends to incorporate intellectual property belonging to a third party, or derivatives thereof, into the work, the Standing Offer Holder represents and warrants that it has secured all necessary rights to grant CMHC the right to copy, publish, modify, create derivatives of, the third party information, to grant any licenses described herein and to carry on any other activities described or contemplated in this Standing Offer.
- g) CMHC may, upon written request grant- the Standing Offer Holder a non-exclusive, perpetual, revocable, world-wide and royalty-free license to (copy/use/publish/modify etc.) any CMHC Intellectual Property which it develops in the course of the Work for any purpose except commercial exploitation in competition with CMHC.

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

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

The SO Holder acknowledges and understands that all CMHC Information is subject to Canadian laws on privacy and access to information under which CMHC is bound and that CMHC considers CMHC information to be under its custody and control of all times. The SO Holder further understands and agrees to treat all CMHC Information as proprietary, confidential and sensitive unless otherwise specifically agreed to in writing by CMHC. The SO Holder shall restrict access to CMHC Information to those persons who have a need to know this information in order to perform the Services under any Call-up awarded as a result of the Standing Offer.

The SO Holder agrees that if any CMHC Information is to be located outside of Canada for any period of time, it shall do the following:

- Obtain CMHC written authorization before the information is transferred to any location outside Canada;
- Inform CMHC where the information will be located outside of Canada, and for what period of time;
- Ensure that CMHC Information is segregated from all other information in a database or other repository physically independent from all other databases or repositories; and
- Inform CMHC of the measures in place to protect CMHC Information from disclosure.

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 SO Holder shall notify CMHC promptly after discovering the potential of disclosure of the CMHC Information so that CMHC has the opportunity to seek a protective order or other appropriate remedy.

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

Please note that for any projects including sensitive information, CMHC information must remain in Canada.

## **2.19 Offeror's Procurement Business Number (PBN)**

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

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

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

## **2.20 Costs Associated with the Preparation of Offers**

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

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

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

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

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

#### **3.2 Statement of Goods and/or Services**

Canada's National Housing Strategy (NHS) includes investments in data, surveys, research and demonstration initiatives to address data and information gaps across the housing continuum, support informed decision making in the housing sector, enhance sector innovation and inform federal housing policy development. Ultimately, the outputs and outcomes of these investments will promote the development of affordable, inclusive and sustainable housing and communities that better meet the needs of Canadians, particularly our most vulnerable populations. Research gaps and policies to support housing across the continuum (from homelessness to homeownership) will be addressed and developed through data analytics, surveys, research, demonstrations, academic networks, and solution labs. (Note: For the purposes of this RFSO, the term "housing" includes both structures and the surrounding community)

CMHC is conducting this RFSO to ensure that we have a pool of experts that can conduct quality housing research that supports NHS and other federal and sector objectives. As well, it seeks to identify talented researchers with knowledge, experience and expertise that is transferrable to the housing context in order to build housing research capacity in Canada. We are seeking qualified housing research expertise in four general streams:

- socio-economic research on housing needs, outcomes and policies,
- technical research on housing planning, design, construction, maintenance, renewal, performance and impacts,
- markets analysis
- housing finance

#### **3.3 Eligibility and Scoring**

To be eligible to offer research services, offerors must meet the minimum eligibility requirements (section 3.4 below), and demonstrate at least three core competency areas and one specialized knowledge area(s) (as described in section 3.5) in the research stream they are applying to. There is no requirement for offerors to be bilingual; unilingual offerors will not be disadvantaged in the evaluation of proposals. However, the ability to work in both French and English will be required for some projects contracted under this RFSO.

After being screened for the minimum requirements, personnel proposed by the offeror will be evaluated in the core competencies and specialized knowledge area(s) which will be scored based

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on projects completed in the last 5 years, and their relevance or transferability to housing. Recent project examples from the last five years that support the areas of core competency and specialization must be provided to support the evaluation and scoring of submissions by CMHC.

### **3.4 Minimum Eligibility Requirements**

In all research areas, it is expected that up to three categories of personnel will be required, depending on the project size. The functions and minimum requirements for each of the three personnel categories are listed below. Offerors do not have to include personnel in all three categories to be successful, however, offerors must have at least one person who meets the minimum requirements for a Senior Researcher/Principal Investigator and Project Manager/Team Leader.

#### ***Project Manager/Team Leader:***

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

#### ***Minimum requirement:***

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

#### ***Senior Researcher/Principal Investigator (mandatory):***

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

- At least five (5) years' experience relevant to the research area(s);
- Completed at least five (5) significant projects/assignments related to the research area(s) in the last five years.
- Depending on the research area, a graduate or post-graduate university degree in the social sciences, planning, public policy, economics, business administration, finance, financial economics, MBA, engineering, architecture, building sciences, or related field or demonstrated equivalent experience.

#### ***Researcher:***

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

- Post-secondary education (i.e. Degree, diploma or certificate) in the social sciences, economics, engineering, architecture, planning or related field
- Experience working on at least three (3) significant projects/assignments related to the research area(s) in the last five years.

### **3.5 Core competencies and specialized knowledge**

Offerors will be evaluated on the extent to which the personnel submitted under this RFSO have the following qualifications, knowledge, experience, core competencies and areas of

specialization that CMHC is seeking. Expectations for each of the four research areas are outlined below. Offerors must demonstrate the mandatory qualifications and experience of personnel in at least three core competency areas and at least one area of specialized knowledge within the research area they are applying to.

### **3.5.1 Socio- Economic Research**

#### **Mandatory Qualifications and Experience:**

- A graduate or post-graduate university degree, preferably in the social sciences, public policy, planning, economics or related field or demonstrated equivalent experience;
- Demonstrated experience applying social science theories, analytical approaches, and empirical research methods; and
- Understanding of relevant data management and analytical software, including SPSS, SAS, EViews, Stata, R or other similar statistical software.

#### **Core Competency areas:**

- Conducting literature searches and reviews (e.g., document reviews, administrative data reviews);
- Developing research frameworks and methodologies to conduct the research;
- Validating and assessing research approaches, methodologies, findings, conclusions and recommendations;
- Developing and testing data gathering tools (e.g., surveys, interview guides, checklists, observation);
- Developing survey methodologies (e.g., online/telephone surveys, key informant interviews, focus groups) and sampling strategies;
- Collecting data - including mining existing data sources, developing primary data from survey and administrative data sources;
- Quantitative methods and analysis using statistical tools (as detailed above) to assess causal and non-causal interactions and
- to carry out Policy Impact Assessments;
- Qualitative research methods and analyses;
- Developing and using evaluation methodologies and counterfactual frameworks;
- Preparing case studies, lessons learned and promising practices;
- Analysing best practices;
- Preparing technical reports, plain language reports, summaries and presentations containing context, findings, conclusions and recommendations;
- Working with large data sets, including those accessible at Statistics Canada's Research Data Centre;
- Developing logic models and indicators;
- Using community based, participatory research methods.
- Conducting social exploratory research.



### **Specialized knowledge areas:**

- Social and affordable housing policy (Canadian and International)
- Social policy (Canadian and International)
- Social and economic outcomes of housing
- Housing Finance, innovative financing for affordable housing (e.g. social finance, social investment funds etc.)
- Social return on investment
- Sustainable communities
- Social inclusion
- Housing needs of Canadians (e.g., new comers, people with disabilities, youth)
- Housing and community development
- Housing and wrap-around services
- Gender-Based Analysis Plus (GBA+) (see definition by Status of Women Canada)
- Intersectional analysis
- Senior's housing, adaptable and accessible housing, universal design
- Indigenous housing needs, community capacity development; expertise working in Indigenous housing
- Northern, remote and rural housing
- Poverty in relation to housing deprivation
- Other specialty knowledge/experience areas offerors may have and choose to highlight

### **3.5.2 Technical Research**

#### **Minimum Mandatory Qualifications and Experience:**

- A graduate degree in: planning, architecture, engineering, building science, other relevant field; or demonstrate equivalency with a combination of knowledge and experience.
- Knowledge and proficiency in the following core areas: building science; building conditions; building performance and optimization; the housing construction sector; building operation and maintenance; financial impacts; and housing costs and renewal strategies to achieve higher performance in terms of affordability, resiliency and energy efficiency.

#### **Core Competency areas:**

- Planning, implementation and delivery of technical or research studies and analyses;
- Creating technical or research work plans, including frameworks, methodologies, conclusions, recommendations and reporting processes;
- Conducting environmental scans, literature or technical reviews, including comparative research and analyses on housing issues;
- Developing data collection methods and tools and conducting data collection, such as: instrumentation to measure energy, water, durability, indoor air quality performance, occupant surveys, interviews, and focus groups;

- Qualitative data methods and analysis
- Dissemination of technical or research findings, recommendations, lessons learned and best or promising practices;
- Facilitating or participating in integrated design charrettes, integrated design processes; or other forums that enable various specialists to work towards optimal outcomes.
- Preparing technical and research reports, including in plain language reports for broader audiences, summaries and presentations containing context, findings, conclusions and recommendations.
- Knowledge of Canada's housing industry and housing system in terms of its major stakeholders, industry skills development, and relevant building regulations, codes, standards and certification programs.

### **Specialized knowledge areas:**

- **Building energy use modelling:** parametric simulations; instrumentation, testing and evaluation; knowledge of multiple software applications; performance optimization; Computer Aided Design and other modelling applications.
- **Northern Housing:** knowledge of, and experience with, the unique technical challenges of delivering, building, operating and preserving the full range of housing in northern and remote locations.
- **Post-Occupancy Evaluations:** on-site data collection; utility bill analysis; client-tenant consultations or surveys; analyses that characterize energy/water use and building performance; housing durability and resiliency analyses; developing tests and methodologies for building performance monitoring; technology assessments and reporting.
- **Environmental Sustainability (Building and Community):** sustainability assessments; climate change policies, programs and regulatory frameworks (various levels of government); GHG inventory calculations; energy security issues; embodied energy assessments, sustainable communities; energy conservation and demand side management strategies.
- **Building Asset Management:** Building Condition Assessments; Reserve Fund Studies; capital replacement costs and cash-flow forecasting (revenue streams, O&M costs); economic and cost-benefit analyses; properties in distress; relevant acts and regulations; board governance; energy retrofit and capital improvement strategies
- **Accessibility:** design and cost assessments; codes and regulations; accessibility continuum (Visitable-Universal); Adaptability features and designs; implementation strategies for new and existing buildings.
- **Technical Innovation:** emerging technologies as applied to housing (e.g. energy efficiency, design, durability, etc.); technical and financial feasibility analyses;

renewables and co-generation; evaluating the application of innovative technologies and practices in housing.

### **3.5.3 Market Analysis**

#### **Minimum Mandatory Qualifications and Experience:**

- A graduate or post-graduate university degree in economics with strong mathematical and/or statistical background;
- Demonstrated experience applying economic theories, analytical approaches, and empirical research methods; and,
- Understanding of relevant data management and analytical software, including SPSS, SAS, EViews, Stata, R or other similar statistical software.

#### **Core Competencies:**

- Conducting literature reviews, document reviews and administrative data reviews;
- Annotated bibliographies;
- Planning specific studies;
- Insight into housing and economics related Canadian and international databases;
- Developing work plans, including planning reports or frameworks and associated methodologies;
- Developing analytical frameworks anchored in economic theory
- Developing and testing data collection tools and conducting data collection including surveys, interviews, focus groups and case studies;
- Analyzing both qualitative and quantitative data using econometric/statistical tools (as detailed above);
- Developing models (economic/statistical/econometric);
- Validating research approaches, methodologies, findings, conclusions and recommendations;
- Preparing technical reports, plain language reports and presentations containing findings, conclusions and recommendations.
- Concise briefings of research findings for CMHC staff

#### **Specialized knowledge areas:**

- Economic and statistical analysis/modelling,
- Economic forecasting/simulation models,
- Housing market analysis,
- House price indices and forecasts,
- Consumer balance sheet and components (assets, liabilities)

### **3.5.4 Housing Finance**

#### **Minimum Mandatory Qualifications and Experience:**

- A graduate or post-graduate university degree in public policy, economics, business administration, finance, financial economics, MBA (or related field).
- Demonstrated experience applying social science theories (including economic), analytical approaches, and empirical research methods;
- Understanding of relevant data management and analytical software, including SPSS, SAS, EViews, Stata, R or other similar statistical software.
- Specialized knowledge in economics, credit risk, financial markets, and financial product innovation analysis

#### **Core Competencies:**

- Developing terms of reference for projects; Constructing work plans, including planning reports or frameworks and associated methodologies;
- Developing and testing data collection tools and conducting data collection including surveys, interviews, focus groups and case studies;
- Conducting literature reviews, document reviews and administrative data reviews;
- Analyzing both qualitative and quantitative data; Validating research approaches, methodologies, findings, conclusions and recommendations;
- Quantitative methods and analysis using statistical tools (as detailed above) to assess causal and non-causal interactions;
- Quantitative methods and analysis using statistical tools (as detailed above) to carry out Policy Impact Assessments;
- Developing analytical frameworks anchored in known economic theory
- Developing models (economic/statistical/econometric)
- Developing reports or associated products (e.g. briefing materials, presentations, technical reports) containing findings, conclusions and recommendations including concise briefings of research findings for CMHC staff
- Assisting with the compilation, analysis and dissemination of findings, lessons learned and best practices; and,
- Preparing technical reports, plain language reports and presentations containing findings, conclusions and recommendations.

#### **Specialized knowledge areas:**

- lending sector
- housing economics and finance,
- securitization,
- the regulatory framework (e.g., OSFI, BIS),
- macro-prudential regulation and policy,

- mortgage guarantees and
- role of government and the private sector in housing finance.

**Specialized designations (if any) such as:**

Chartered Financial Analyst or Financial Risk Manager

**3.6 Other requirements**

In any call-ups arising from this Standing Offer, all Successful offerors will be expected to provide a certificate of insurance commensurate with the tasks, as determined by CMHC, and as per the terms and conditions in section 6.3 Article 4.21.

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## **4 SECTION 4 OFFER REQUIREMENTS**

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

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

Response #	
4.2	Covering Letter
4.3	Table of Contents
4.4	Offeror's Qualifications (Template 1 – Mandatory Minimum Requirements,
4.5	Response to Statement of Goods and/or Services (Template 2)
4.6	Project Management and Communication
4.7	Financial Information (if applicable)
4.8	Pricing

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

Requirements for each Response Item are detailed below.

### **4.2 Covering Letter**

A covering letter of no more than 2 pages on the offeror's letterhead shall be submitted and include the following:

- (a) A short description of the company or joint venture/consortium
- (b) The research area (Socio-economic, Technical or Market Analysis/Housing Finance and any particular areas of specialization.
- (c) The names of the personnel included in the Offer and category (Project Manager, Senior Researcher and Researcher.
- (d) The primary contact person with respect to this RFSO: the individual's name, address, contact numbers by phone and fax, and contact e-mail address, if available.
- (e) The locations of primary and all other offices that would be servicing any Call-ups issued from this SO.
- (f) The location of CMHC information if outside of Canada or Confirmation that CMHC Information will remain in Canada

### **4.3 Table of Contents**

The offeror shall include a Table of Contents using the response item headings and numbering system identified in 4.1 of this section of the RFSO. The response should be paginated for easy referencing by the evaluation committee.

### **4.4 Offeror's Qualifications Mandatory**

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

- (a) Template 1 Mandatory Minimum Requirements. (please see section 7: Appendix D)

#### **4.5 Response to Statement of Goods and/or Services Mandatory**

The offeror MUST provide information relative to the specifications listed in Section 3, The Statement of Goods and/or Services to be covered under this Standing Offer (SO) by

- (a) Completing Template 2 – Response to Statement of Goods and/or Services (please see section 7: Appendix E).
- (b) Résumés for all project personnel who are listed in the Offer to the CMHC account.
- (c) One example each of technical report, plain language publication/web content/etc, concise briefing/summary/abstract and presentation.
- (d) Additional reports that are attributable to the personnel in the offer, referenced in Template 2, and for which hyperlinks cannot be provided.

#### **4.6 Project Management and Communication Mandatory**

**(a)Project Management:** The offeror shall describe its project management organizational structure including reporting levels and lines of authority for the personnel in this offer.

**(b)Quality Control:** The offeror shall briefly (one page or less) describe its approach to quality control including:  
methods used in ensuring quality of the research and report writing, and response mechanisms in the case of errors, omissions, delays, etc.

**(c)Status Reporting to CMHC:** The offeror shall agree to provide written and/or oral progress reports to CMHC as necessitated by any call ups resulting from this standing offer. .

**(d) Interface with CMHC:** The offeror shall identify its interface point with CMHC how issues and difficulties will be resolved.

#### **4.7 Financial Information Mandatory**

##### **4.7.1 Credit Check**

Sole proprietorships and partnerships must provide a statement contained within their offer giving written permission for CMHC to perform a credit check as required. This requirement can be satisfied by signing the Certificate of Submission (section 7 Appendix A).

##### **4.7.2 Financial Capacity**

CMHC reserves the right to conduct an assessment of the potential Standing Offer Holder(s) financial capacity. Should the offeror be selected as a Standing Offer Holder following the RFSO evaluation and qualification process, CMHC will request the necessary financial statements to confirm the financial capacity of the offeror. At that time, the potential SO Holder must provide to CMHC the following information, as appropriate, upon 72 hours of CMHC's request:

**Note:** Failure to comply with the Financial Information submission requirements as indicated above and within this section, will result in disqualification of the Offeror(s) at which time no further consideration will be provided to the respective offer(s).

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

CMHC requires the provision of the financial statements for the analysis of financial capacity. You must provide a complete set of signed, detailed, audited financial statements for each of the last three (3) years of your firm. You must agree to provide any other financial information that CMHC may subsequently request. The auditor's report must be signed by an appropriate officer of the audit firm. In the case that your financial statements are not audited, CMHC will only accept them if they are accompanied by a signed review engagement report for each year. 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 information required for their legal form as indicated above for sole proprietorships, partnerships or corporations. For partnerships of individuals (as opposed to partnerships of corporations), each individual must provide written permission for CMHC to perform a credit check on them as individuals.

**4.8 Pricing**

**Mandatory**

The offeror must include per diem rates, hourly rates and any other pre-determined rates associated with the delivery of the services described in this RFSO for each of the Project Manager, Senior Researcher and Researcher positions identified for this offer.



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

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

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

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

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

### **5.2 Limitation of Damages**

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

### **5.3 Evaluation Table**

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

### **5.4 Evaluation Methodology**

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

Each substantially compliant offer shall be evaluated by an Evaluation Committee made up of qualified personnel. Each Committee member shall evaluate and numerically score each offer in accordance with the evaluation criteria as shown in the Evaluation Table, Appendix "B".

An offer must pass each of the pass/fail requirements and must meet the minimum upset score in each category (as shown on the Evaluation Table) to remain in the evaluation.

Each compliant offer that meets the minimum upset scores in each category shall then be awarded a Standing Offer (SO).

## 5.5 Technology Security Evaluation

When applicable and at CMHC's sole discretion, CMHC shall have the right to conduct an assessment of the contractor's security controls and frameworks (the "**Security Measures**"), which assessments may be carried out by CMHC itself or by a third party on behalf of CMHC. CMHC may request the following information, within an agreed upon timeframe, to permit an analysis of the successful applicant's Security Measures:

1. Provide proof, to the satisfaction of CMHC of the contractor's implementation of one of the following security control guidelines: (i) ISO 27001, (ii) ITSG-33 or (iii) equivalent guideline for a protected B environment;
2. Provide proof, to the satisfaction of CMHC that an enhanced Threat and Risk Assessment has been conducted on the contractor's technology/infrastructure;
3. Provide proof, to the satisfaction of CMHC that an internal and external Network Vulnerability Assessment has been conducted on the contractor's technology/infrastructure;
4. Provide CMHC with a "Security Controls Checklist" as detailed within one of the following security control guidelines: (i) ISO 27001, (ii) ITSG-33 or (iii) equivalent.

The contractor will be required to document how they have met or exceed the baseline safeguards.

The contractor may refine Security Measures as part of this process to ensure a sufficient amount of detail for their allocation of high-level design specification. CMHC will review and potentially approve any refinements implemented by the contractor as part of CMHC's review and change disposition. Upon request from CMHC I&T Security Risk Management the lead contractor will provide assurance that security controls are being managed in accordance with a protected B environment throughout the life of the Agreement. The contractor will be required to ensure that any additional safeguards have been implemented to address any risks residual risks identified by it or by CMHC.

## 5.6 Offeror Selection

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

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

Announcement of the successful offerors will be made to all offerors following the notification of the Standing Offer offerors.

## 5.7 Financial Review

CMHC may carry out a credit check and/or a financial capacity on the lead offerors before beginning SO discussions. This is a pass/fail test. Pass means that SO discussions begin. Fail means that the lead offerors may not enter into SO discussions and are disqualified from further consideration. The financial review will be based on the information supplied by the offeror as per Sections 4.7.1 and 4.7.2 of this RFSO.

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

### **6.1 Standing Offer**

The attached Standing Offer and resulting Call-ups Terms and Conditions forms section 6.3 of this RFSO and will be a part of any Call-ups raised against this SO.

### **6.2 Mandatory Terms and Conditions**

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

### **6.3 Standing Offer and Any Resulting Call-up Terms and Conditions**

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

**1.1** The Standing Offer Holder covenants and agrees to provide \_\_\_\_\_ on an 'as and when needed' basis for \_\_\_\_\_. CMHC will issue a written call up to the Standing Offer Holder when CMHC requires the Standing Offer Holder's Services. Each call up issued shall be subject to the terms and conditions of the Standing Offer. Upon the issue of a call up, the Standing Offer Holder shall provide the services as detailed in the Call-up and in accordance with the Statement of Goods and/or Services.

**1.2** The Standing Offer Holder acknowledges that the Standing Offer does not guarantee that CMHC will issue a Call-up to the Standing Offer Holder and that call ups will be issued at the sole discretion of CMHC.

#### **Article 2.0 - Term of the Standing Offer**

**2.1** The term of the Standing Offer Agreement shall be for a period of two (2) years commencing on **date** and ending on **date**. CMHC will have the right to refresh the Standing Offer by seeking new suppliers to submit offers on the first anniversary of the initiation of the Standing Offer.

**2.2** Notwithstanding Article 2.1 above, CMHC shall conduct an assessment of the Standing Offer Holder's work performed for past assignments and based on this assessment, at no less than sixty (60) days prior to the anniversary date of signing this Standing Offer, CMHC will advise the Standing Offer Holder in writing of their willingness to extend yearly or decision to terminate this Standing Offer.

### **2.3 Termination**

CMHC may terminate a Call-up against a Standing Offer for any reason with no penalty by giving thirty (30) days written notice, at any time during the Term.

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

1. The Standing Offer Holder commits a material breach of its duties under the Call-up against a Standing Offer, unless, in the case of such breach, the Standing Offer Holder, within ten (10) calendar days after receipt of written notice of such breach from CMHC, in a manner satisfactory to CMHC in its sole, absolute and non-reviewable discretion, (a) cures such breach or takes reasonable steps to cure such breach and (b) indemnifies CMHC for any resulting damage or loss;
2. The Standing Offer Holder commits numerous breaches of its duties under this Standing offer that collectively constitute a material breach;
3. A change in control of the Standing Offer Holder where such control is acquired, directly or indirectly, in a single transaction or series of related transactions, or all or substantially all of the assets of the Standing Offer Holder are acquired, by any entity, or the Standing Offer Holder is merged with or into another entity to form a new entity, unless the Standing Offer Holder demonstrates to the satisfaction of CMHC that such event will not adversely affect its ability to perform the services under this Standing offer;
4. The Standing Offer Holder commits fraud or gross misconduct; or
5. The Standing Offer Holder becomes bankrupt or insolvent, or a receiving order is made against the Standing Offer Holder, or any assignment is made for the benefit of the creditors, or if an order is made or a resolution passed for the winding up of the Standing Offer Holder, or if the Standing Offer Holder takes the benefit of any Statute for the time in force relating to bankrupt or insolvent debtors.

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

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

## **Article 3.0 - Financial**

### **3.1 Fixed Pricing**

In consideration of the provision of the Goods and/or Services, as described in Article 1.0, CMHC agrees to pay the Standing Offer Holder an amount based on rates provided in response to Article 4.8 of this RFSO and attached as Appendix “\_\_\_”.

In the event that the RFSO is extended beyond the initial two (2) year term, rates will be based on the rates in effect on the Standing Offer renewal date.

### **3.2 Taxes to be Collected by Standing Offer Holder**

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

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

### **3.3 Invoicing**

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

### **3.4 Audit**

The Standing Offer Holder shall maintain proper records and accounts during the term of the Agreement and for a period of three (3) years following the end of the term and any renewals thereof. The Standing Offer Holder agrees to allow the Corporation's internal and external

auditors the right to examine, at any reasonable time, any and all records relating to the services identified herein.

Any audit will be subject to generally accepted accounting principles.

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

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

### **4.1 Assignment of the Standing Offer**

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

### **4.2 Standing Offer Holder's Indemnification**

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

### **4.3 No Limitation**

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

#### **4.4 Non-Compliance or Default by Standing Offer Holder**

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

#### **4.5 Force Majeure**

In the event that the Standing Offer Holder is prevented from fulfilling its obligations under the terms of a Call-up raised against this Standing Offer by a force majeure or act of Nature (an event or effect that cannot be reasonably anticipated or controlled), the Standing Offer Holder shall notify CMHC in writing, within the shortest period of time. The said written notice shall be sent by registered mail and shall state the factors that constitute a force majeure or an act of Nature. Without limiting the application of the above, the following shall constitute cases of force majeure: war, serious public disturbances, all impediments arising from orders or prohibitions of public authority, acts of Nature, actions of public enemies, strikes, lockout and other labour disputes, riots, flooding, hurricane, fire, explosion or any other natural disasters over which the Standing Offer Holder has no reasonable control.

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

#### **4.6 Compliance With Laws**

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

#### **4.7 Laws Governing Standing Offer**

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

#### **4.8 Independent Standing Offer Holder**

The Standing Offer Holder shall act as an independent Standing Offer Holder for the purposes of this Standing Offer. It and its employees, officers and agents are not engaged as employees of CMHC. The Standing Offer Holder agrees to so advise its employees, officers, and agents.



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Without limiting the generality of the foregoing, the Standing Offer Holder shall retain complete control of and accountability for its employees and agents. The Standing Offer Holder shall prepare and process the payroll for its employees directly, and shall withhold and/or pay all applicable employment taxes and payroll deductions required in respect of its employees. All personnel shall, at all times, and for all purposes, be solely in the employment of the Standing Offer Holder.

#### **4.9 Standing Offer Holder's Authority**

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

#### **4.10 Corporation Identification**

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

#### **4.11 Moral Rights**

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

#### **4.12 Intellectual Property Rights**

- a) For the purpose of this Agreement, Intellectual Property shall include all information, materials, reports and other work product produced under any Call-up resulting from this Standing Offer.
- b) CMHC shall retain all rights which it holds in any pre-existing Intellectual Property and shall be the sole owner of all rights in any Intellectual Property developed in the course of the Work, irrespective of the manner in which the Intellectual Property comes into existence (hereinafter referred to as « CMHC Intellectual Property»). The Standing Offer Holder agrees to acknowledge CMHC's rights in the CMHC Intellectual Property upon request by CMHC.
- c) The Standing Offer Holder shall have no right in the CMHC Intellectual Property except as may be granted in writing by CMHC. The Standing Offer Holder shall not divulge, release, copy, modify or publish the CMHC Intellectual Property without the prior written consent of CMHC.
- d) Nothing in this Agreement shall affect the ownership of any pre-existing Intellectual Property rights in any tools, methodologies, databases and materials used to produce the CMHC Intellectual Property.

- 
- e) Where a Subcontractor may create CMHC Intellectual Property in the course of the Work, the Standing Offer Holder is solely responsible for ensuring that all rights in the Intellectual Property are transferred to CMHC in compliance with clause 8.2 above.
  - f) In the event the Standing Offer Holder intends to incorporate intellectual property belonging to a third party, or derivatives thereof, into the work, the Standing Offer Holder represents and warrants that it has secured all necessary rights to grant CMHC the right to copy, publish, modify, create derivatives of, the third party information, to grant any licenses described herein and to carry on any other activities described or contemplated in this Standing Offer.
  - g) CMHC may, upon written request grant, the Standing Offer Holder a non-exclusive, perpetual, revocable, world-wide and royalty-free license to (copy/use/publish/modify etc.) any CMHC Intellectual Property which it develops in the course of the Work for any purpose except commercial exploitation in competition with CMHC.

#### **4.13 Photographs**

- (a) All images included in the text of the report, either photographs or diagrams, must also be provided separately on a CD as PDFs, TIFFs, JPEGs, or EPSs with a minimum resolution of 300dpi. The Standing Offer Holder acknowledges that images embedded in the text are not suitable for CMHC's publication process, but may include such images to indicate suggested image placement in the report.
- (b) The Standing Offer Holder is responsible for obtaining all necessary rights to allow for the unrestricted publication of photographs, technical drawings, diagrams, charts and tables by CMHC and shall advise CMHC where acknowledgement of the photographer or author is required. Upon request by CMHC, the Standing Offer Holder shall provide a sworn representation that it has obtained the required rights.

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

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

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

The Standing Offer Holder further understands and agrees to treat all CMHC Information as proprietary, confidential and sensitive unless otherwise specifically agreed to in writing by CMHC. The Standing Offer Holder shall restrict access to CMHC Information to those persons

who have a need to know this information in order to perform the Work under any Call-up raised against the Standing Offer.

If information is not to remain in Canada or can be accessed elsewhere

The Standing Offer Holder agrees that if any CMHC Information is to be located outside of Canada for any period of time, it shall do the following:

- Obtain CMHC written authorization before the information is transferred to any location outside Canada;
- Inform CMHC where the information will be located outside of Canada, and for what period of time;
- Ensure that CMHC Information is segregated from all other information in a database or other repository physically independent from all other databases or repositories; and
- Inform CMHC of the measures in place to protect CMHC Information from disclosure.

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

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

#### **4.15 House of Commons**

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

#### **4.16 Scope of Standing Offer**

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

#### **4.17 Income Tax Reporting Requirement**

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

#### **4.18 Conflict of Interest**

- (a) The Standing Offer Holder and its principals, employees and agents shall avoid any conflict of interest during the term of this SO and any Call-up raised against this SO and shall immediately declare any existing, potential or apparent conflict and shall, upon direction of CMHC, take steps to eliminate any conflict or perception that a conflict of interest exists.
- (b) The Standing Offer Holder must not provide any services to any third party in circumstances that might reasonably give rise to a conflict of interest, including a conflict between the Standing Offer Holder's duties to that third party and the Standing Offer Holder's duties to CMHC.
- (c) In the event that a conflict of interest, real or perceived, cannot be resolved to the satisfaction of CMHC, CMHC shall have the right to immediately terminate the SO and any Call-up against this SO. All portions of the Work which have been completed at the date of termination shall be forwarded to CMHC and CMHC shall be liable for payment to the Standing Offer Holder of an amount which, in the sole opinion of CMHC, constitutes reasonable payment for the partial performance of the Standing Offer Holder's obligations under the Call-up. Upon such payment, CMHC shall have no further obligation of any nature or kind to the Standing Offer Holder.
- (d) Any former public office holder must be in compliance with the post-employment provisions of the Conflict of Interest and Post-Employment Code for Public Office Holders (2006) in order to derive a direct benefit from any Call-up which may arise from this Standing Offer.

#### **4.19 Approval of Services**

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

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

- (a) direct Standing Offer Holder to redo the work or part of the section which was not completed to CMHC's satisfaction;
- (b) withhold payment due or accrued due to the Standing Offer Holder for services rendered pursuant to the Call-up under this Standing Offer
- (c) set off any expenses incurred by CMHC in remedying the default or failures of Standing Offer Holder against payment for payment due or accrued due to the Standing Offer Holder with regards to any Call-up;
- (d) terminate this Standing Offer or any Call-up against this SO for default and /or seek indemnification from the Standing Offer Holder for losses suffered by CMHC as a result of such default.

#### **4.20 Ownership**

- (a) The quarterly reports and any other reports prepared exclusively for the Corporation shall remain the property of the Corporation and all copyrights thereto are the property of the Corporation and neither the Standing Offer Holder nor its servants or agents shall divulge, release or publish any such documentation.
- (b) Any and all other information relating to the Corporation and obtained by the Standing Offer Holder during the course of execution of its duties under this shall remain the property of the Corporation and shall not be used in any way or disclosed to anyone without the prior written consent of the Corporation.

#### **4.21 Suspension of Services and Changes in Specifications**

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

#### **4.22 Replacement of Personnel**

- 
- (a) It is agreed that the following individual(s) will perform the Work (or provide the Services) and shall exercise active control over all aspects of the Work (Services) and shall be directly involved in all major decisions:

*Insert names of individuals*

The Call-up resulting from the Standing Offer to perform the Work (Services) shall be considered as the engagement of the named individual(s) personally, even though CMHC may be engaging the services of the Standing Offer Holder. Major roles in the performance of the Work (Services) may not be assigned to other individuals without obtaining the prior written consent of CMHC.

- (b) In the event that the individuals named in this clause are unable to perform all of the Work (Services) for any reason and CMHC does not accept any replacements proposed by the Standing Offer Holder, CMHC may terminate the Call-up immediately with no further obligation of any kind to the Standing Offer Holder.
- (c) To request CMHC's consent to replace an individual assigned to all or part of the Work (Services), the Standing Offer Holder shall provide CMHC with a description of the qualifications, experience and competencies of the individual being proposed as the replacement. CMHC shall have full discretion to consent or to refuse to consent to the assignment of the Work (Services). All other obligations of the Standing Offer Holder, including timing requirements, will not be affected by a request under this section and will remain in full force and effect.

#### **4.23 Insurance**

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

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

(b) The Standing Offer Holder will provide and maintain Professional Liability Insurance for a limit of not less than \$2,000,000. The policy will provide 30 days prior written notice of cancellation to Risk Management Consultant, 700 Montreal Road, Ottawa, Ontario K1A 0P7. Coverage is to include Standing Offer Holders' employees and Standing Offer Holders' contract employees (if applicable) as named insureds.

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

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

#### **4.24 Extras**

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

#### **4.25 Standing Offer Holder/Corporation Relationships**

The Corporation agrees that the Standing Offer Holder, in the normal course of its normal working relationship with other corporations, can indicate that the Standing Offer Holder has entered into a Standing Offer with the Corporation. The Standing Offer Holder agrees, however, that it will not, without the prior written consent of the Corporation, reveal or disclose any details concerning the contents of the project of this Standing Offer.

#### **4.26 Final Report**

- (a) 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, the content and form of the report will be consistent with the specifications as outlined in a call-up resulting from this Standing Offer.
- (b) The Standing Offer Holder will supply,
  - (i) A final report with an executive summary of the main findings and recommendations;
  - ii) one copy of all material of which CMHC has ownership and publication rights in the form in which it was used by the author
- (c) CMHC
  - (i) is under no obligation to publish all or part of the final report or its associated materials, reports, maps and other documents;
  - (ii) has the right to edit or publish the final report, in part or in its entirety;

(iii) shall be the sole judge of those parts of the final report, or those materials and reports that it considers for publication.

#### **4.27 Final Standing Offer Form**

It is understood and agreed that the terms and conditions set out in section 6.3 will, at CMHC's discretion, form part of any resultant Standing Offer and accordingly may be incorporated into and form part of any and all authorized Call-up(s) against a Standing Offer.

#### **Article 5.0 - Standing Offer Administration**

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

***IN WITNESS WHEREOF*** this Offer has been signed by the duly authorized signing officers of the Standing Offer Holder. By submitting a response to the Request for Standing Offer, the Offeror agrees to the Terms & Conditions contained herein.



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## SECTION 7: APPENDICES

### Appendix A: Certification of Submission Mandatory

\_\_\_\_\_ hereby:  
Company Name Procurement Business Number (PBN)

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

Signed this \_\_\_\_\_ day of \_\_\_\_\_, 2018 at \_\_\_\_\_, Canada.

*Corporations are not required to provide a corporate seal.*

**Corporation/Individual:**

Signature of Signing Authority      Name & Title of Signing Authority

Declaration: I have the authority to bind the company.

**Appendix B: Evaluation Table**

NOTE: Offerors applying to more than one research area (Socio- Economic, Technical, Housing Finance, Housing Market Analysis) will be evaluated separately for each research area.

EVALUATION CRITERIA	FAIL in any section will not proceed any further in the evaluation			Result
<b>1. Offeror Qualifications:</b> <ul style="list-style-type: none"> <li>• Minimum Requirements are met (Template 1)</li> </ul>	PASS/FAIL			
<b>2. Project Management (section 4.5)</b> <ul style="list-style-type: none"> <li>• Lines of authority are clearly identified</li> <li>• Quality control measures identified</li> <li>• Project interface with CMHC is described</li> </ul>	PASS/FAIL			
<b>3. Pricing (Section 4.6)</b> <ul style="list-style-type: none"> <li>a) Per diem rates, hourly rates and any other pre-determined rates for each of the Project Manager, Senior Researcher and Researcher positions are provided.</li> <li>b) Above rates conform to industry standard rates for similar services.</li> </ul>	PASS/FAIL			
Scored Criteria	WEIGHT 100 Total	POINTS 1 to 5	UPSET SCORE	SCORE AxB
<b>1. Response to Statement of Goods and Services (Template 2)</b> <ul style="list-style-type: none"> <li>• Application is well organized and well written.</li> </ul>	10		30	
<ul style="list-style-type: none"> <li>• Demonstrates necessary qualifications and experience (Template 1: Part 1)</li> <li>• Demonstrated three core competencies supported through relevant/appropriate project examples worked on by key personnel (Template 1: part 2)</li> <li>• Demonstrated specialized knowledge that is supported through relevant/appropriate project examples worked on by key personnel (Template 1: part 3)</li> </ul>	75		225	
<ul style="list-style-type: none"> <li>• Demonstrated ability to communicate clearly (technical, plain language, briefing, presentation) (Section 4.)</li> </ul>	15		45	
<b>TOTALS</b>	100		300	

**Appendix C:                   Mandatory Compliance Checklist**

- |   |             |
|---|-------------|
| <input type="checkbox"/> Delivery Instructions and Deadline             | Section 2.3 |
| <input type="checkbox"/> Offering Period                                | Section 2.7 |
| <input type="checkbox"/> Offeror's Qualifications                       | Section 4.4 |
| <input type="checkbox"/> Response to Statement of Goods and/or Services | Section 4.5 |
| <input type="checkbox"/> Pricing  | Section 4.8 |
| <input type="checkbox"/> Certificate of Submission                      | Appendix A  |

# Template 2 – Response to Statement of Work –Socio-Economic

## PART 1: Qualifications and Experience

### Appendix D: Template I

<b>Project Manager (PM) (Complete ONE for each PM on your application)</b> Responsible for and manages the project and project team, ensuring that the project is developed, performed and completed within the agreed upon time, resources (including cost) and performance parameters. Has lead role in overall quality assurance for the project.		<b>Evaluation (to be completed by CMHC)</b>		
NAME: _____ (Can be the same as the Senior Researcher)				
1. A minimum of five (5) years of hands-on experience in project management.	Project Management Experience: (show at least 5 years) Dates _____ Job title/Organization _____		Meets	Does Not Meet
2. Experience managing at least five (5) projects/assignments directly related to the research area(s).	Relevant projects or assignments: Please list project and your role <b>Project</b> _____ <b>Year</b> _____		Meets	Does Not Meet
	1			
	2			
	3			
	4			
	5			

# Template 2 – Response to Statement of Work –Socio-Economic

## PART 1: Qualifications and Experience

Senior Researcher /Principle Investigator (SR/PI) (Complete ONE for each SR/PI on your application): Develops, designs, and carries out significant segments of projects of medium to high levels of complexity. Has lead role in analysis and preparation of reports.		Evaluation (to be completed by CMHC)		
NAME: _____ (can be the same as the PM)				
1. At least five (5) years' experience relevant to the research area(s);	Research experience (show at least 5 year) : Dates: _____ Job title/organization _____	Meets	Does Not Meet	
	_____			
	_____			
	_____			
2. Experience on at least five (5) projects/assignments related to the research area(s).	Relevant projects or assignments (last 5 years): Please list project and your role.		Meets	Does Not Meet
	<b>Project/Role</b>			
	<b>Year</b>			
	1			
	2			
	3			
3. Depending on the research area (s), a graduate or post-graduate university degree, in the Social Sciences, Planning, Public Policy, Economics, Business Admin, Finance, Financial Economics, MBA, Engineering, Architecture, Building sciences, related field, or demonstrated equivalent experience.	Education or equivalent experience:		Meets	Does Not Meet
	<b>Degree or Equivalency/Field/Institution</b>			
	<b>Year</b>			
	_____			

# Template 2 – Response to Statement of Work –Socio-Economic

## PART 1: Qualifications and Experience

<b>Researcher (Complete ONE for each Researcher on your application):</b> Organizes and conducts activities research projects, gathers data, conducts analysis, prepares draft reports.		<b>Evaluation (to be completed by CMHC)</b>		
NAME: _____				
1. Post-secondary education (e.g., degree, certificate) in the social sciences, economics, finance, engineering, architecture, building sciences, planning or related field or equivalent experience.	<b>Education:</b> Degree, Diploma or Certificate/Field/ Institution		Meets	Does Not Meet
	Year:			
2. Experience working on at least three (3) projects/ assignments related to the research area(s). (may include university/college work)	<b>Project Experience:</b> Project title/role		Meets	Does Not Meet
	Year			

### Appendix E: Template 2

#### Template 2: Socio-Economic

- Part 1: Qualifications and Experience
- Part 2: Core Competencies
- Part 3: Specialized Knowledge

#### Template 2: Technical

- Part 1: Qualifications and Experience
- Part 2: Core Competencies
- Part 3: Specialized Knowledge

## **Template 2 – Response to Statement of Work –Socio-Economic**

### **PART 1: Qualifications and Experience**

#### **Template 2: Market Analysis**

Part 1: Qualifications and Experience

Part 2: Core Competencies

Part 3: Specialized Knowledge

#### **Template 2: Housing Finance**

Part 1: Qualifications and Experience


Part 2: Core Competencies

Part 3: Specialized Knowledge





**Template 2 – Response to Statement of Work –Socio-Economic  
PART 1: Qualifications and Experience**



**Template 2 – Response to Statement of Work –Socio-Economic**  
**PART 1: Qualifications and Experience**

**3. Understanding of relevant data management and analytical software, including SPSS, SAS, EViews, Stata, R or other similar statistical software**

## Template 2 – Response to Statement of Work –Socio- Economic PART 2: Core Competencies -

### PART 2: Core Competencies

- individuals must demonstrate a minimum of three core competency areas.
- **Please provide summaries of up to 3 of the most relevant projects from the last 5 years and your role in the project** from 3 or more core competency areas from the list below. Applicants will only be evaluated and qualified in the areas where relevant project examples are provided. If the same project example is used to demonstrate more than one competency area, please focus on the aspect of the project most relevant to the competency area, and your specific role.
- **Information exceeding the space provided (approx. 250 words – Calibri 11) will not be reviewed or evaluated.**
- Links to project reports or attachments may be looked at for reference purposes only. Applicants must provide concise descriptions of the project and their role in the space provided

### Core Competency areas Socio-Economic Research:

1. Conducting literature searches and reviews (e.g., document reviews, administrative data reviews);
2. Developing research frameworks and methodologies to conduct the research;
3. Validating and assessing research approaches, methodologies, findings, conclusions and recommendations;
4. Developing and testing data gathering tools (e.g., surveys, interview guides, checklists, observation);
5. Developing survey methodologies (e.g., online/telephone surveys, key informant interviews, focus groups) and sampling strategies;
6. Collecting data - including mining existing data sources, developing primary data from survey and administrative data sources;
7. Quantitative methods and analysis using statistical tools to assess causal and non-causal interactions and carry out Policy Impact Assessments;
8. Qualitative research methods and analyses;
9. Developing and using evaluation methodologies and counterfactual frameworks;
10. Preparing case studies, lessons learned and promising practices;
11. Analysing best practices;
12. Preparing technical reports, plain language reports, summaries and presentations containing context, findings, conclusions and recommendations (An example of each must be provided)
13. Working with large data sets, including those accessible at Statistics Canada's Research Data Centre;
14. Developing logic models and indicators;
15. Using community based, participatory research methods.

# Template 2 – Response to Statement of Work –Socio- Economic

## PART 2: Core Competencies -

Minimum of three Core Competencies  
(add additional cells as appropriate to include additional competencies)

Competency:

Competency:

Competency:

## Template 2 – Response to Statement of Work – Socio- Economic PART 3: Specialized Knowledge

### **PART 3: Specialized Areas of Work**

**Please indicate areas of specialized knowledge and provide a short description of your (and your firm's) experience, using project examples.**

#### **Specialized knowledge areas:**

- Social and affordable housing policy (Canadian and International)
- Social policy (Canadian and International)
- Social and economic outcomes of housing
- Housing Finance, innovative financing for affordable housing (e.g. social finance, social investment funds etc.)
- Social return on investment
- Sustainable communities
- Social inclusion
- Housing needs of Canadians (e.g., new comers, people with disabilities, youth)
- Housing and community development
- Housing and wrap-around services
- Gender-Based Analysis Plus (GBA+) (see definition by Status of Women Canada)
- Intersectional analysis
- Senior's housing, adaptable and accessible housing, universal design
- Indigenous housing needs, community capacity development; expertise working in Indigenous housing
- Northern, remote and rural housing
- Poverty in relation to housing deprivation
- Other specialty knowledge/experience areas offerors may have and choose to highlight

#### **Specialized Knowledge Areas:**

Bilingual - If applicable, describe you or your firms ability to work in both French and English:

**Specialized Knowledge Areas: (from list above)**  
**Please add cells as required to accommodate Specialized Knowledge areas.**

# Template 2: Response to Statement of Work – Technical Research

## PART 1: Qualifications and Experience

Senior Researcher/Principle Investigator \_\_\_\_\_

OR

Researcher \_\_\_\_\_

(Please complete for each SR/PI and each Researcher)

**This Template has three parts – (1)Experience, (2) Core Competencies and (3)Specialized Knowledge**

**PART 1: Please provide examples that demonstrate the following:**

**Refer to section 3.5.2 of the RFSO.**

**1. Education and professional experience:**

**2. Knowledge and proficiency in the following core areas: building science; building conditions; building performance and optimization; the housing construction sector; building operation and maintenance; financial impacts; and housing costs and renewal strategies to achieve higher performance in terms of affordability, resiliency and energy efficiency.**

**Template 2: Response to Statement of Work – Technical Research**  
**PART 1: Qualifications and Experience**

A large, empty rectangular box with a thin black border, occupying the upper half of the page. It is intended for the user to provide their qualifications and experience in response to the Statement of Work.



## Template 2 – Response to Statement of Work – Technical Research

### PART 2 – Core Competencies

#### PART 2: Core Competencies

- individuals must demonstrate a minimum of three core competency areas.
- **Please provide summaries of up to 3 of the most relevant projects from the last 5 years and your role in the project** from 3 or more core competency areas from the list below. Applicants will only be evaluated and qualified in the areas where relevant project examples are provided. If the same project example is used to demonstrate more than one competency area, please focus on the aspect of the project most relevant to the competency area, and your specific role.
- **Information exceeding the space provided (approx. 250 words – Calibri 11) will not be reviewed or evaluated.**
- Links to project reports or attachments may be looked at for reference purposes only. Applicants must provide concise descriptions of the project and their role in the space provided

#### Core Competency areas Technical Research:

1. Planning, implementation and delivery of technical or research studies and analyses;
2. Creating technical or research work plans, including frameworks, methodologies, conclusions, recommendations and reporting processes;
3. Conducting environmental scans, literature or technical reviews, including comparative research and analyses on housing issues;
4. Developing data collection methods and tools and conducting data collection, such as: instrumentation to measure energy, water, durability, indoor air quality performance, occupant surveys, interviews, and focus groups;
5. Qualitative data methods and analysis
6. Dissemination of technical or research findings, recommendations, lessons learned and best or promising practices;
7. Facilitating or participating in integrated design charrettes, integrated design processes; or other forums that enable various specialists to work towards optimal outcomes.
8. Knowledge of Canada's housing industry and housing system in terms of its major stakeholders, industry skills development, and relevant building regulations, codes, standards and certification programs.

# Template 2 – Response to Statement of Work – Technical Research

## PART 2 – Core Competencies

Minimum of three Core Competencies  
(add additional cells as appropriate to include additional competencies)

Competency:

Competency:

Competency:

## Template 2 – Response to Statement of Work – Technical Research

### PART 3: Specialized Knowledge

#### PART 3: Specialized Areas of Work

Please indicate areas of specialized knowledge and provide a short description of your (and your firm's) experience, using project examples.

##### Specialized knowledge areas:

- **Building energy use modelling:** parametric simulations; instrumentation, testing and evaluation; knowledge of multiple software applications; performance optimization; Computer Aided Design and other modelling applications.
- **Northern Housing:** knowledge of, and experience with, the unique technical challenges of delivering, building, operating and preserving the full range of housing in northern and remote locations.
- **Post-Occupancy Evaluations:** on-site data collection; utility bill analysis; client-tenant consultations or surveys; analyses that characterize energy/water use and building performance; housing durability and resiliency analyses; developing tests and methodologies for building performance monitoring; technology assessments and reporting.
- **Environmental Sustainability (Building and Community):** sustainability assessments; climate change policies, programs and regulatory frameworks (various levels of government); GHG inventory calculations; energy security issues; embodied energy assessments, sustainable communities; energy conservation and demand side management strategies.
- **Building Asset Management:** Building Condition Assessments; Reserve Fund Studies; capital replacement costs and cash-flow forecasting (revenue streams, O&M costs); economic and cost-benefit analyses; properties in distress; relevant acts and regulations; board governance; energy retrofit and capital improvement strategies
- **Accessibility:** design and cost assessments; codes and regulations; accessibility continuum (Visitable-Universal); Adaptability features and designs; implementation strategies for new and existing buildings.
- **Technical Innovation:** emerging technologies as applied to housing (e.g. energy efficiency, design, durability, etc.); technical and financial feasibility analyses; renewables and co-generation; evaluating the application of innovative technologies and practices in housing.

# Template 2 – Response to Statement of Work – Technical Research

## PART 3: Specialized Knowledge

<b>Specialized Knowledge Areas:</b>
<input type="checkbox"/> Bilingual - If applicable, describe you or your firms ability to work in both French and English:
<b>Specialized Knowledge Area: (from list above)</b> <b>(Please add cells as required to accommodate Specialized Knowledge areas)</b>

# Template 2 – Response to Statement of Work – Market Analysis

## PART 1: Qualifications and Experience

Senior Researcher/Principle Investigator \_\_\_\_\_

OR

Researcher \_\_\_\_\_

(Please complete for each SR/PI and each Researcher)

This Template has three parts – (1)Experience, (2) Core Competencies and (3)Specialized Knowledge

**PART 1: Please provide examples that demonstrate the following:**

**Refer to section 3.5.3 of the RFSO**

**1. Education and professional experience:**

**2. Demonstrated experience applying economic theories, analytical approaches, and empirical research methods**

# Template 2 – Response to Statement of Work – Market Analysis

## PART 1: Qualifications and Experience

3. Understanding of relevant data management and analytical software, including SPSS, SAS, EViews, Stata, R or other similar statistical software.

# Template 2 – Response to Statement of Work – Market Analysis

## PART 3: Specialized Knowledge

### PART 2: Core Competencies

- individuals must demonstrate a minimum of three core competency areas.
- **Please provide summaries of up to 3 of the most relevant projects from the last 5 years and your role in the project** from 3 or more core competency areas from the list below. Applicants will only be evaluated and qualified in the areas where relevant project examples are provided. If the same project example is used to demonstrate more than one competency area, please focus on the aspect of the project most relevant to the competency area, and your specific role.
- **Information exceeding the space provided (approx. 250 words – Calibri 11) will not be reviewed or evaluated.**
- Links to project reports or attachments may be looked at for reference purposes only. Applicants must provide concise descriptions of the project and their role in the space provided

### Core Competency areas Market Analysis:

16. Conducting literature reviews, document reviews and administrative data reviews;
17. Annotated bibliographies;
18. Planning specific studies;
19. Insight into housing and economic related Canadian and international databases;
20. Developing work plans, including planning reports or frameworks and associated methodologies;
21. Developing analytical frameworks anchored in economic theory
22. Developing and testing data collection tools and conducting data collection including surveys, interviews, focus groups and case studies;
23. Analyzing both qualitative and quantitative data using econometric/statistical tools;
24. Developing models (economic/statistical/econometric);
25. Validating research approaches, methodologies, findings, conclusions and recommendations;

# Template 2 – Response to Statement of Work – Market Analysis

## PART 3: Specialized Knowledge

**Minimum of three Core Competencies**  
**(add additional cells as appropriate to include additional competencies)**

**Competency:**

**Competency:**

**Competency:**



## Template 2 – Response to Statement of Work – Market Analysis

### PART 3: Specialized Knowledge

<b>PART 3: Specialized Areas of Work</b> <b>Please indicate areas of specialized knowledge and provide a short description of your (and your firm's) experience, using project examples.</b>
<b>Specialized knowledge areas:</b> <ul style="list-style-type: none"><li>• Economic and statistical analysis/modelling,</li><li>• Economic forecasting/simulation models,</li><li>• Housing market analysis,</li><li>• House price indices and forecasts,</li><li>• Consumer balance sheet and components (assets, liabilities)</li></ul>
<b>Specialized Knowledge Areas:</b>
<input type="checkbox"/> Bilingual - If applicable, describe you or your firms ability to work in both French and English:
<b>Specialized Knowledge Areas: (from list above)</b> <b>Please add cells as required to accommodate Specialized Knowledge areas.</b>

# Template 2 – Response to Statement of Work– Housing Finance

## PART 1: Qualifications and Experience

Senior Researcher/Principle Investigator \_\_\_\_\_

OR

Researcher \_\_\_\_\_

(Please complete for each SR/PI and each Researcher)

**This Template has three parts – (1)Experience, (2) Core Competencies and (3)Specialized Knowledge**

**PART 1: Please provide examples that demonstrate the following:**

**Refer to section 3.5.4 of the RFSO**

**1. Education and professional experience:**

**2. Demonstrated experience applying social science theories (including economic), analytical approaches, and empirical research methods**

# Template 2 – Response to Statement of Work– Housing Finance

## PART 1: Qualifications and Experience

**3. Understanding of relevant data management and analytical software, including SPSS, SAS, EViews, Stata, R or other similar statistical software.**

**4. Specialized knowledge in economics, credit risk, financial markets or financial product innovation analysis**

# Template 2 – Response to Statement of Work– Housing Finance

## PART 3: Specialized Knowledge

### PART 2: Core Competencies

- individuals must demonstrate a minimum of three core competency areas.
- **Please provide summaries of up to 3 of the most relevant projects from the last 5 years and your role in the project** from 3 or more core competency areas from the list below. Applicants will only be evaluated and qualified in the areas where relevant project examples are provided. If the same project example is used to demonstrate more than one competency area, please focus on the aspect of the project most relevant to the competency area, and your specific role.
- **Information exceeding the space provided (approx. 250 words – Calibri 11) will not be reviewed or evaluated.**
- Links to project reports or attachments may be looked at for reference purposes only. Applicants must provide concise descriptions of the project and their role in the space provided

### Core Competency areas Housing Finance Research:

1. Developing terms of reference for projects; Constructing work plans, including planning reports or frameworks and associated methodologies;
2. Developing and testing data collection tools and conducting data collection including surveys, interviews, focus groups and case studies;
3. Conducting literature reviews, document reviews and administrative data reviews;
4. Analyzing both qualitative and quantitative data; Validating research approaches, methodologies, findings, conclusions and recommendations;
5. Quantitative methods and analysis using statistical tools to assess causal and non-causal interactions and to carry out Policy Impact Assessments;
6. Developing analytical frameworks anchored in economic theory
7. Developing models (economic/statistical/econometric)
8. Assisting with the compilation, analysis and dissemination of findings, lessons learned and best practices

# Template 2 – Response to Statement of Work– Housing Finance

## PART 3: Specialized Knowledge

**Minimum of three Core Competencies**  
**(add additional cells as appropriate to include additional competencies)**

**Competency:**

**Competency:**

**Competency:**

# Template 2 – Response to Statement of Work– Housing Finance

## PART 3: Specialized Knowledge

<b>PART 3: Specialized Areas of Work</b> <b>Please indicate areas of specialized knowledge and provide a short description of your (and your firm’s) experience, using project examples.</b>
<b>Specialized knowledge areas:</b> <ul style="list-style-type: none"><li>• lending sector</li><li>• housing economics and finance,</li><li>• securitization,</li><li>• the regulatory framework (e.g., OSFI, BIS),</li><li>• macro-prudential regulation and policy,</li><li>• mortgage guarantees and</li><li>• role of government and the private sector in housing finance.</li></ul>
<b>Specialized Knowledge Areas:</b>
<input type="checkbox"/> Bilingual - If applicable, describe you or your firms ability to work in both French and English:
<input type="checkbox"/> Chartered Financial Analyst or Financial Risk Manager
<b>Specialized Knowledge Area: (from list above)</b> <b>(Please add cells as required to accommodate Specialized Knowledge areas)</b>