

Question 12

Please confirm that complete financial statements are only required if requested and do not have to be provided with our submissions.

Answer 12

Yes, that is correct.

Question 13

As a privately-owned company, we do not get audited statements nor review engagement reports; we get notice to reader statements. Will these be sufficient if we are asked to provide financial statements?

Answer 13

Notice to reader statements prepare by a certified accountant are sufficient.

Question 14

We have done a significant amount of research – much of it for CMHC – but the research was done more than five years ago; there has been little outside funding for research available in Ontario over the past five years. Is it sufficient if we report on internal research we have conducted and publicly –funded research conducted more than five years ago?

Answer 14

Research will be evaluated based on its relevance to the research stream, competency areas, and specialization. Internal research may be included. Research that is more than five years old will be considered based on its relevance.

Question 15

Depending on the research project, we have several project managers and researchers that may be involved. Do you want all to be listed in the response, or just our most senior people?

Answer 15

All personnel included in the offer, particularly those applying as senior researchers, who bring specialized research expertise, should submit Template 2 – parts 1, 2 and 3.

Question 16

Re template 1 for the Senior Researcher – This template refers to “Project Management Experience” in the heading of item 1. We assume that, in accordance with section 3.4 of the RFP, this term refers to experience managing “significant segments of projects,” not entire projects. Is that correct?

Answer 16

The heading should say “Experience”. Senior researchers must demonstrate a minimum of five years of experience as a senior researcher in their respective field of research.

Question 17

Re template 1 for the Senior Researcher and the Researcher – In accordance with item 2 of this template, we assume that the requirement stated in section 3.4 of the RFP that these projects be in the last 5 years has been deleted. Is that correct?

Answer 17

No. Section 3.4 of the RFP is correct, for the Senior Research, projects should be within the last five years.

Question 18

Re template 2 for all streams – The first part of this template states “Please complete for each SR/PI and each Researcher.” Our understanding of sections 3.5.1 through 3.5.4 of the RFP is that these requirements apply to all categories of personnel, including the Project Manager. Therefore, this phrase should read “Please complete for each PM, each SR/PI, and each Researcher.” Is that correct?

Assuming our understanding in question 3 below is correct, template 2 needs to be corrected for all streams – not only the heading, as indicated in question 3, but also the drop down menu for Category of Personnel, which just provides SR/PI and Researcher as possible selections.

Answer 18

No. Template 2 should be completed for Senior Researchers and Researchers. It does not need to be completed for project managers, unless the project manager is also the senior researcher.

Question 19

For the Project Manager and Senior Researcher, under Template 2 - Part One, can the same experience/examples be used for "At least five (5) years' experience relevant to the research area(s)" and "Experience on at least five (5) projects/assignments related to the research area(s)"?

Answer 19

Yes. However, generally under “5 years of experience relevant to the research area” we are looking to see the position held (during what years), and the general area and types of work. Under “Experience on at least five projects/assignments related to the research area” is the list of relevant projects.

Question 20

With respect to Part 2 of Template 2, may we list projects and outline which core competency areas they addressed, or must we first choose competencies and then provide projects as evidence?

- a. Should it be the latter, how many projects can we provide per competency – one, or up to three?

Answer 20

Either approach is fine, as long as it is easy for the review committee to clearly see examples of the Senior Researcher and Researcher's work in the identified competency areas. Up to three projects may be provided, and the same project may apply to more than one competency area.

Question 21

As per the qualifications and experience section for a researcher in Template 2, is work completed during a Master's or a PhD valued the same as project experience?

Answer 21

Work with clear relevance that was completed during a Masters or PhD will be viewed as project experience, but the value (as compared to project experience) will depend on the specific case and subject matter.

Question 22

Just to confirm, the last three years' financial statements are not required at the time of submitting the proposal for the Standing Offer but CMHC reserves the right to request them at a later date.

Answer 22

Yes.

Question 23

Definitions. Can CMHC provide the definitions of the minimum for core competencies in the 15 categories identified for socio-economic research.

Answer 23

As per the evaluation grid, Offerors are asked demonstrate three core competencies supported through relevant/appropriate project examples worked on by key personnel.

Question 24

Forms. In our submission, we assume we can supply: a completed Template 1 and Template 2 for each team member that we are proposing? That is for project managers, principal investigators, researchers.

Answer 24

Yes

Question 25

Supporting Associates. Where can we indicate other associates we are able to draw on for special research knowledge?

Answer 25

If the offeror wishes to indicate associates that can be drawn upon only for their specialized knowledge, they should be entered as researchers or senior researchers in Template 2 (section 3), with the description of their specialized area and relationship with the offeror.

Question 26

Projects. Re. Template 1, Part 2: Projects to be listed for each member of the team.

Can these be different from the three projects to be used in demonstrating core competencies for team members, and is there a maximum of FIVE to be included here? Can different project be shown for different team members?

Answer 26

The projects listed in Template 1, part 2 can be different from the projects demonstrating core competencies, and more than 5 may be included.

Question 27

'Mandatory Minimum Requirements, Part 2, Where are project summaries to be inserted? Are reports or summaries to be attached? Some of our recent reports for CMHC are too large in size to attach (e.g. more than 10 MBs). Is it acceptable to attach only an Executive Summary, a CMHC Research Highlight, or provide web-links to the study reports? (If reports are not in the public domain, are summaries suitable?)

Answer 27

Project summaries may be provided in a separate attachment to Template 1, if desired. Copies of reports) attributed to team members may be included in an attachment and must be clearly labelled. Report highlights or extracts are acceptable.

Offerors are advised that reports should be provided to demonstrate the competencies and areas of specialization requested by the RFSO. When attaching additional reports, the relevance of and attribution to specific personnel in the offer should be clear.

Question 28

Is it allowable to provide additional project summaries (i.e., more than 3) to demonstrate competencies?

Answer 28

Offerors should pick the most relevant projects (up to 3) for each competency from the past 5 years. Summaries of additional projects may be provided at the offerors discretion. Offerors are

advised when attaching additional reports, the relevance of and attribution to specific personnel in the offer should be clear.

Question 29

References: Where are client references to be provided for CMHC to contact?

Answer 29

Offerors are not required to provide references, but based on the reports submitted in the RFSO, CMHC reserves the right to follow up with offerors for permission to contact those organizations that commissioned their work.

Question 30

Template 1, Part 2: Does Template 1, Part 2 have to be completed for each staff/team member showing their individual roles on specific projects and if so, what is meant by roles?

Answer 30

Part 2 has to be completed for each staff/team member to demonstrate a core competency such as qualitative research methods and analysis. Role means the piece of work or contribution the individual made that demonstrates the competency – research design, data analysis, coding, etc.

Question 31

Sample Reports: Where ‘links’ to reports or copies of reports are not in the public domain (i.e., where not yet made public by the organization sponsoring the research), is it acceptable to only include the title of the project and name of the client and project officer responsible in that organization so CMHC can verify that the work was done, and attest to the quality of the work?

Answer 31

It is acceptable to provide the title, client and project officer. Please note that 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.

Question 32

Definition of ‘specialized knowledge’: Does specialized knowledge refer to specialized knowledge in the housing field alone, or can it be in any discipline, area of public policy service delivery, or professional practice? Or, does this refer only to each of the specialized subareas identified under each of the four streams of work?

Answer 32

It refers specifically to the specialized sub areas indicated under each of the four streams of work. If there is an area of specialization that is highly relevant, but not mentioned, the offeror may include it under Section 3 of Template 2 - specialized knowledge.

Question 33

Identifying specialized knowledge: Where in the Templates provided by CMHC does the Proponent identify the areas of Specialized Knowledge it is experienced in and identify how these areas are relevant to this specific SO and the stream of work? In Template 2, Part 2 (Core Competencies), can we assume that reference to other projects and related work is acceptable?

Answer 33

See Template 2, Section 3 - specialized knowledge in the Research stream you are applying to. If there is an area of specialization that is highly relevant, but not mentioned, the offeror may add a description of their specialization.

Question 34

Section 3.5.2 of the RFP includes 9 core competency areas but Template 2 for the Technical Research stream includes only 8 (the second to last bullet from the RFP is missing: “Preparing technical and research reports, including in plain language reports for broader audiences, summaries and presentations containing context, findings, conclusions and recommendations.”). Can you confirm that all nine core competencies listed in the RFP are indeed included, and that the template should include “Preparing technical and research reports, including in plain language reports for broader audiences, summaries and presentations containing context, findings, conclusions and recommendations.”?

Answer 34

The bullet regarding preparation of reports was removed from the Technical Research Stream because under section 4.5 c of the RFSO “One example each of technical report, plain language publication/web content/etc, concise briefing/summary/abstract and presentation” is required for each applicant and will be evaluated and scored separately.

Please note, a similar bullet regarding preparation of reports is listed under the Socio Economic Research Stream and should have been removed from the core competency list. Writing and presentation will be assessed and scored separately, and cannot be submitted as one of the three core competency areas.

Question 35

Section 4.5(c) of the RFP states that offerors must provide “One example each of technical report, plain language publication/web content/etc, concise briefing/summary/abstract and presentation”. Is the one example to be provided for each proposed personnel, for each core competency listed by personnel, or otherwise? Should these all be provided as hyperlinks?

Answer 35

One example for each proposed personnel. Hyperlinks are acceptable where available. Electronic files are acceptable where hyperlinks are not available.

Question 36

Related to question #2, above, Section 4.5(d) of the RFP states that offerors must provide “Additional reports that are attributable to the personnel in the offer, referenced in Template 2, and for which hyperlinks cannot be provided.” Should the additional reports provided in this section be only those reports/work products that are not available online via hyperlinks?

Answer 36

Yes, electronic copies of reports, report extracts or report highlights, should be provided where hyperlinks are not available.

Question 37

Can you confirm that Template 2 does NOT need to be completed for Project Managers/Team Leaders? The template states that it is to be completed only for each SR/PI and Researcher.

Answer 37

Confirmed. Template 2 does not need to be completed for Project Managers or Team Leaders.

Question 38

The evaluation criteria provided in Appendix B states that Parts 1, 2, and 3 of Template 1 will collectively be given a weight of 75. Should this not refer to Template 2 instead of Template 1?

Answer 38

Please note that Parts 1, 2, and 3 of Template 2 will collectively be given a weight of 75.
