

This Solicitation Amendment No. 1 is issued to:

1. Extend the Closing date to **2:00 PM EDT on April 11, 2019;**
2. Provide the following question and answer:
 - Q.1. Would it be possible to disclose potential incumbents to that work, including contractor awarded work for CMHC’s RFP #000057 on Data Standards Cost-Benefit Analysis?
 - A.1. In terms of the Services provided, there is no overlap between the RPF #000057 and RFP #000083. The information requested is not required for the Proponent to be able to submit a complete proposal.
 - Q.2. Can CMHC provide a list of envisioned “Partner firms” as part of the work under this RFP?
 - A.2. Partner firms will potentially include firms from across the mortgage lifecycle including, but not limited to, financial institutions (as lenders and originators), brokers, servicers and mortgage loan insurers. The final selection of Partner Firms will be based upon the strategy outlined by the proponent and the firms that have made themselves available for the initiative to CMHC. Where a type of firm has not already been identified by CMHC, CMHC will seek out a suitable firm for the Proponent. An exact list of such firms will be finalized with the Lead Proponent.
 - Q.3. The RFP identifies “Partner Firms” as “financial institutions (federally and provincially regulated), loan origination system vendors, mortgage brokers and mortgage loan insurers, among others”. Does CMHC anticipate that Phase 2 will require interaction with all of the “types” of partner firms identified? If so, can CMHC provide additional detail, including “among others”?
 - A.3. The Proponent should outline their ideal scope of firms in their proposal. The MISMO model is designed to accommodate the entire mortgage lifecycle and the analysis to be conducted should reflect that. The Proponent is not required to conduct the analysis for all types of industry players but should, within costs considerations, consider the extent of the mortgage lifecycle.
 - Q.4. Can CMHC confirm whether a resource under cool-off period with CMHC at the time of proposal submission, but free of all restrictions at the time of contract award, may be qualified as a team member in the proposal for this RFP? As such, can CMHC confirm it is acceptable to list this resource in the RFP documents?
 - A.4. At this time, CMHC has no opinion regarding the cooling-off period and is open to the Proponent describing the expertise available to it, should it be selected as the Lead Proponent, at the time an Agreement is signed, assuming the cooling-off period has come to bear.
 - Q.5. Can CMHC confirm CMHC would accept more than one resource to be qualified under the “researcher” and “senior researcher” roles?

- A.5. Yes. The proposal should list all resources as necessary to complete the project. Only one resource will be required to meet the minimum requirements outlined, but the proposal should outline the specific roles each resource will undertake throughout the contract and the qualifications (a resume) of all the individuals.
- Q.6. Can the Proponent include/ suggest additional resources to those proposed in the RFP?
- A.6. Yes. The Proponent should include the resources they intend to use to complete the work described in the proposal. The resources listed in the RFP are the minimum resources required but the Proponent should list all resources, their qualifications (a resume) and the roles they will undertake in the analysis that will work to complete the contract.
- Q.7. Would experience in Uniform Closing Datasets (UCD) qualify as MISMO experience, since MISMO is a U.S. UCD standard?
- A.7. Use of the specific MISMO products is required to qualify for MISMO experience. The use of other industry standards does not contribute to the requirement for MISMO experience, including the use of Uniform Closing Datasets that are not used in or created from the MISMO model.
- Q.8. Given the nature of the engagement, can the Proponents involve experienced resources from their US member firm, who have in-depth experience with MISMO. Can CMHC confirm that no additional security checks and clearance is required for these resources?
- A.8. Proponents may include resources from different firms but must clearly outline from which firm each resource and task will be assigned. Further, the Proponent must clearly identify how the project flow will be managed between the two firms. The security check procedure is the same regardless of the location of the firm or the number of firms represented in the proposal. The Proponent should include the qualifications (a resume) of all individuals in the proposal.
- Q.9. Could CMHC provide an indication of the number and type (Canadian Schedule 1 bank, Mid-sized regulated lender, unregulated lender, credit union, etc.) of Partner Firms that CMHC envisions being involved as part of Phase 2 of this engagement?
- A.9. The Proponent should outline in their proposal the number of firms they would ideally have access to while recognizing the need to ensure that the analysis covers sufficient firms to confidently speak to the broad Canadian Mortgage Industry and while also recognizing the significant ask from CMHC this project represents.

All other terms and conditions remain unchanged.