



NOTICE OF PLANNED PROCUREMENT (NPP)

FOR CMHC's INSURANCE BROKER SERVICES

Date issued:
June 07, 2019

Solicitation File Number:
NPP-000101

Solicitation Closes:
July 3, 2019 at 11:00 am Ottawa local time

Inquiries:

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1. INTRODUCTION

Canada Mortgage and Housing Corporation (CMHC) is Canada's national housing agency. At CMHC, we are driven by our belief that everyone in Canada should have a roof over their head, and that a world-leading housing system can be the cornerstone of a thriving and inclusive society.

We work with community organizations, the private sector, non-profit agencies and all levels of government to contribute to the stability of the financial system, facilitate access for Canadians in housing need, and offer objective housing research and advice to governments, individuals and the housing industry.

We are a Crown Corporation and we report to Parliament through the Minister of Families, Children and Social Development.

Our 2,000 employees work in locations across Canada and our impact is felt across the housing system.

A comprehensive Company profile of CMHC can be found at www.cmhc-schl.gc.ca

2. DEFINITIONS

CMHC	Canada Mortgage and Housing Corporation
NPP	Notice of Planned Procurement
Proponent	Potential vendors submitting a response to a RFP
Respondent	Potential vendors submitting a response to the NPP
RFP	Request for Proposal
Marketing	Means procuring insurance quotes on new insurance coverages not currently in program
Marketing Exercise	Means insurance quotes on current insured coverages

3. BACKGROUND

CMHC is governed by a Board of Directors appointed by the Government of Canada and reports to Parliament through the Minister of Families, Children and Social Development. CMHC provides management, advisory and other service to the Canada Housing Trust and to the First Nations Market Housing Fund. It also manages and administers Granville Island, on behalf of the Government of Canada.

The legislative framework governing CMHC consist primarily of the Canada Mortgage and Housing Corporation Act, the National Housing Act and the Financial Administration Act.

CMHC has a complex risk profile and faces a host of challenges from multiple fronts and operates within an environment of close financial scrutiny and governance. CMHC has a large real estate portfolio and key locations are the National Office Complex in Ottawa, Ontario and Granville Island in Vancouver, BC and various business centers and real estate property throughout Canada.

4. OBJECTIVE

The objective of this NPP is to identify Proponents who meet the mandatory requirements of a subsequent RFP which will be issued directly to those qualified Proponents. CMHC intends to select one (1) Proponent from a subsequent RFP.

The contract(s) awarded resulting from a subsequent RFP process will be on a non-exclusive basis. CMHC reserves the right to award this business in part or in whole at its sole discretion as a result of this process or to cancel all or part of this selection process at any time.

5. TECHNICAL REQUIREMENTS

CMHC has developed the initial direction of the RFP scope and the technical requirements as outlined below.

Services include the provision of core insurance broker, risk management and claims management services to manage the Corporations Insurance portfolio. The Services is to assist CMHC with brokering its corporate insurance coverage, claims management and risk management program. The Proponent will establish a bilingual risk management account management team to facilitate interaction with CMHC Corporate Insurance department and operational units as required.

CMHC's Insurance program is made up of twenty (20) policies covering a wide range of exposures with a premium volume of approximately one (1) million Canadian Dollars. Our Risk Management strategy includes a combination of Risk Transfer and Risk Retention. As such, CMHC carries various retentions and manages some of our claims internally.

Core insurance broker services; This includes but not limited to the provision of: the Marketing Exercise and obtaining property and casualty insurance coverages; facilitate renewal strategy meetings with insurers; providing detailed summaries of insurance coverage including side by side analysis; providing Marketing of new coverages; issuance of certificate of insurance and automobile liability cards; facilitating stewardship reviews; have the ability to provide professional advice on time-sensitive basis in a wide range of insurance and risk management issues; and having the ability to facilitate in-person meeting upon request.

Risk management services; This includes but not limited to the provision of: identifying loss exposures, hazard risks and business risks; identifying processes that will minimize the adverse effects of accidental losses on an organization; analysis of the insurance portfolio and ways to improve it; have the ability to obtain and relay relevant market intelligence including insurer solvency, trends, benchmarking and emerging risks.

Claims management services; This includes but not limited to the provision of: technical assistance from the insurance broker on coverage interpretation; liaison with insurer claim representatives; liaison with third party claims administrator; assist and facilitate in establishing claims reporting procedures to insurers; facilitate meetings between insurers and third party claims administrators; minimum of two (2) in-house claims professionals in the management of claims advisor service.

Deliverables and timeline

It is CMHC's intent to finalize an ensuing agreement in November 2019 with Work and/or the transition period to commence in December 2019.

Compliance to Acts and Standards

The successful proponent must be compliant with the following federal legislation, policies and standards:

- Personal Information Protection and Electronic Documents Act (PIPEDA); and
- Meet all Provincial and Territorial Industry licensing regulations

CMHC Data

All CMHC data must reside in Canada

Other Services

The successful proponent may be asked to provide other related services on an as-and-when-required basis of which the details will be defined in a separate estimate during the term of the ensuing agreement. Such services may be related to the following but not limited to:

- Consulting Service;
- Modelling; and
- Marketing of additional insurance coverages not currently insured.

Resource(s) qualifications

- a. Must have a minimum of 7 years professional experience as a commercial lines broker; and
- b. Must have at a minimum an in-house specialist providing services and expertise with dedicated focus in the following areas:
 - Executive Risks
 - Real Estate
 - Fidelity Risks
 - Construction Risks
 - Environmental Risks
 - Cyber Risks
 - Financial Institution Risks
 - Contractual Risk
 - Claims Specialist

6. MANDATORY REQUIREMENTS

Respondents wishing to participate in a RFP process must meet the following mandatory requirements:

The Proponent(s)

- Must be able to comply with CMHC data to reside in Canada at all times;
- Must be able to communicate in both official languages, English and French;
- Must meet all Provincial and Territorial Industry licensing regulations. The Proponent must demonstrate their compliance by providing evidence that they are licensed in all of Canada's provinces and territories with a signed declaration and without the use of sub-brokers;
- Demonstrate that their brokerage firm maintains Errors and Omissions insurance coverage to a limit not less than \$10,000,000. Such insurance shall provide coverage for all errors and omissions made by the Proponent, its partners, officers, directors and employees and shall be kept in force for the term of the contract and for three (3) years following the date of expiry of the contract. Provide a certificate of insurance demonstrating your compliance;
- Must have a minimum of \$250 million of annual written premium in Canada in each of the last 3 years and an established entity for a minimum of seven (7) years;
- Must have in-house specialists in the following areas and provide:
 - Real estate
 - Financial institutions
 - Public entities
 - Cyber risks
 - Public entities
 - Claims management (large property, liability and D&O)
- Conduct business with the following Insurers (at a minimum):
 - AIG Insurance Company
 - Strategic Underwriters
 - Liberty Mutual Insurance Company
 - Chubb
 - Zurich Insurance Co.
 - Travellers
 - Global Aerospace
 - QBE (Lloyd's of London)
 - Guarantee Company of Canada

7. PROCUREMENT PROCESS

By this open NPP CMHC is seeking technically experienced, capable and financially stable companies to submit their interest in responding to a subsequent RFP for the provisions of the above mentioned requirements.

Respondents should express their interest to CMHC by the closing date shown on this notice. In the event CMHC chooses to issue an RFP following this NPP, the RFP will be issued to those Respondents who: (i) meet the mandatory requirements; and (ii) have expressed their interest to CMHC. The expression of interest form is provided with this NPP.

The timing of a subsequent RFP is planned as follows:

- RFP issue date: August 2019
- Proposal receipt: September 2019
- Evaluations & negotiations: September & October 2019
- Award date: October/November 2019

8. TERMS OF REFERENCE

- Only those Respondents able to meet the RFP timelines as stated above, should respond to this NPP;
- A question and answer period is not available for the purpose of this NPP. A subsequent RFP will allow for a question and answer period;
- In order for interested Respondents qualifications to be considered for this opportunity, CMHC requests that the NPP responses be provided to the Procurement Officer Daniela Michaud **by July 3 , 2019 at 11:00 am Ottawa local time** to dcmichau@cmhc-schl.gc.ca or ProcurementSourcing_Sourcesd'approvisionnement@cmhc-schl.gc.ca;
- CMHC reserves the right to request supporting details and validate any interested parties qualifications and capabilities;
- CMHC intends to conduct negotiations as part of a RFP selection process;
- CMHC reserves the right to cancel this NPP at any point and/or refrain from issuing an RFP;
- Neither this NPP nor any subsequent selection process will in any way impose an obligation or responsibility on CMHC (i) to execute any contract with any Respondent and (ii) for any costs incurred by a Respondent to respond to this NPP. By submitting a response to this NPP, Respondents waive any right to seek costs or damages or any other remedy against CMHC with respect to this NPP or any subsequent RFP or other selection process.

9. NPP RESPONSE

The Respondent's NPP response should include the following items:

- A signed copy of the Expression of Interest; and
- A brief description per mandatory requirement as to how the Respondent meets the mandatory requirements outlined in this NPP, maximum 1 page total on the Respondent's letter head.

EXPRESSION OF INTEREST

This form is used to confirm your company's intent to respond to a subsequent Request for Proposal.

Notice of Planned Procurement No.: NPP-000101

Dear Sir or Madam:

We hereby confirm our interest in responding to a RFP. We acknowledge and warrant that we meet the mandatory requirements stated in this notice, and possess the requisite experience and expertise, as well as the financial stability to (i) fulfill the service; or (ii) supply the good.

Please indicate language of preference for RFP documents:

English; or

French.

Signed:	
Name & Title: (point of contact)	
Company:	
Address:	
Telephone:	
Mobile:	
Email:	
URL:	