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# **REQUEST FOR STANDING OFFER (RFSO)**

**For**

**Housing Research Services**

Request for Standing Offer No.:	<b>RFSO-000462</b>
Issued:	<b>May 17, 2021</b>
Submission Deadline:	<b>June 28, 2021 at 11:00 a.m. EDT Ottawa local time</b>
Address Inquiries to RFSO Contact:	<b>Tim Webster</b>
Email RFSO Contact:	<b><a href="mailto:tjwebste@cmhc-schl.gc.ca">tjwebste@cmhc-schl.gc.ca</a></b>



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## **PART 1 – SUBMISSION INSTRUCTIONS**

### **1.1 OBJECTIVE OF THIS RFSO**

Canada Mortgage and Housing Corporation (“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 CMHC.

CMHC has 2,000 employees 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.

With this Request for Standing Offer (“RFSO”) Canada Mortgage and Housing Corporation (“CMHC”) is seeking prospective respondents to qualify in accordance with the evaluation process outlined in *Part 2 – Evaluation and Selection* for eligibility to provide Housing Research Services in three (3) streams of services and as further described in Appendix C – RFSO Specifications.

CMHC is conducting this RFSO to ensure that we have a pool of experts that can conduct high priority housing research that contributes to CMHC’s 2020-23 Research Plan and 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.

Respondents may submit responses for any or all of these streams, and depending on the results of the evaluation, respondents may be selected to be listed in more than one stream.

Stream 1: Social and Statistical Research

Stream 2: Technical Research

Stream 3: Housing Finance and Market Analysis

Following the completed RFSO process, CMHC will issue contract(s) (“Call-up(s)”) against the resulting Master Agreement detailing the exact level of services they wish to order at a particular time during the effective period of the Master Agreement. Please refer to Sections 1.3 – *Master Agreement* and 1.4 *Call-up Process* below.

### **1.2 RFSO CONTACT**

For the purposes of this procurement process, the “RFSO Contact” will be:

Tim Webster, Procurement Officer  
[tjwebste@cmhc-schl.gc.ca](mailto:tjwebste@cmhc-schl.gc.ca)

Respondents and their representatives are not permitted to contact any employees, officers, agents, appointed officials or other representatives of CMHC, other than the RFSO Contact, concerning matters regarding this RFSO. Failure to adhere to this rule may result in the disqualification of the respondent and the rejection of the respondent’s response.

### 1.3 MASTER AGREEMENT

Selected respondents will be invited to enter into a Standing Offer (“SO”) in the form set out in Appendix D (the “Master Agreement”), which will govern the potential subsequent provision of the scope of work and deliverables (collectively the “Deliverables”) pursuant to the second stage process (“Call-up Process”). The term of the Master Agreement is to be for a period of two (2) years with an option to extend the Master Agreement on the same terms and conditions for two (2) additional one-year terms. Selected respondents who have signed the Master Agreement are hereinafter referred to as the “SO Holder”.

### 1.4 CALL-UP PROCESS

**Call-ups will be made by CMHC under the SO Master Agreement and must be for Deliverables included in the SO Master Agreement at the prices and in accordance with the terms and conditions specified in the SO Master Agreement. CMHC does not guarantee that any selected SO holder will be awarded a Call-up. Call-up(s) may be issued on an as-and-when required basis as per the following:**

1. Direct Call-up(s)

CMHC may issue a direct Call-up to any SO Holder up to CAD\$100,000.00 total contract value (service fees including all applicable taxes and travel expenses). The SO Holder must not perform any work or services in response to Call-ups which would cause the total cost to CMHC to exceed the said sum, unless an increase is pre-authorized by CMCH.

2. Rotational basis

- a. For any contract values of an individual requirement between CAD\$100,001.00 and CAD\$400,000.00 two (2) SO Holders, at a minimum, qualified in the applicable stream, are to be invited to provide a proposal for the individual requirement.
- b. For any contract values of an individual requirement exceeding CAD\$400,000.00 all SO Holders qualified in the applicable stream are to be invited to provide a proposal for the individual requirement.

The following list represents scenarios in which the rotation process may not be followed:

- a. In the event CMHC requires the expertise of a specific SO Holder due to its prior engagement of a particular and/or similar case, CMHC may award the Call-up to the specific SO Holder;
- b. In the event CMHC determines an immediate business risk, reputational risk or security risk to its organization, officers and/or employees, CMHC may award a Call-up to a specific SO Holder;
- c. Where the cost of traveling will justify it, a Call-up may be issued to a SO Holder with a resource who is located in closer proximity to where the services will be rendered;
- d. In the event CMHC’s choice to receive the services in one of two official languages prevents the SO Holder on the list from providing the services, CMHC may award the mandate to the next SO Holder on the list who can meet the requirements; and

- e. To avoid any perceived or potential conflict of interest, if the SO Holder resource is already engaged to provide services on a particular case and/or if the SO Holder has multiple resources qualified to render service, they will be asked to provide a different resource. If the SO Holder does not have additional qualified resources available, CMHC may award the Call-up to the next SO Holder on the list.

The SO Holder must not perform any work or services in response to Call-ups which would cause the total cost to CMHC to exceed the said sum, unless an increase is pre-authorized by CMHC.

## 1.5 RFSO TIMETABLE

Issue Date of RFSO	May 17, 2021
Deadline for Questions	May 28, 2021 at 11:00 A.M EDT Ottawa Local Time
Deadline for Issuing Addenda	June 14, 2021
Submission Deadline	June 28, 2021 at 11:00 A.M EDT Ottawa Local Time
Evaluation Deadline	July 2021
Anticipated Execution of Master Agreement	August 2021

**The RFSO timetable is tentative only and may be changed by CMHC at any time. Changes will be communicated in accordance with Section 3.2.2.**

## 1.6 SUBMISSION OF RESPONSES

### 1.6.1 Procurement Business Number

CMHC utilizes the Supplier Registration Information (SRI) database maintained by Public Works and Government Services Canada as the Official CMHC source list. All respondents must be registered with Public Works and Government Services Canada prior to submitting a response. The Procurement Business Number (PBN) provided by this registration must be included with the respondent's response. If respondents are not registered and wish to do so, please access <https://buyandsell.gc.ca/for-businesses/selling-to-the-government-of-canada/register-as-a-supplier>

### 1.6.2 Responses to be submitted at the prescribed location

Response submissions must be emailed to CMHC's electronic bid submission system (EBID) to the address indicated below:

Email Address: [EBID@cmhc-schl.gc.ca](mailto:EBID@cmhc-schl.gc.ca) ("Submission Location")

Responses sent to any other e-mail address will not be considered.

Please be advised that EBID has a size limitation of 10 MB. Respondents may submit their response in multiple smaller files indicating the number of emails submitted (for example: email 1/3, 2/3, 3/3) in the body of the email.

Upon receipt of responses, an automated confirmation will be issued by EBID to the sender's e-mail address. It is strongly recommended that respondents follow up with the RFSO Contact should they not receive said confirmation within thirty (30) minutes of submission.

### **1.6.3 Responses to be submitted on time**

Responses must be submitted pursuant to Section 1.6.2 above and on or before the submission deadline

**June 28, 2021 at 11:00 a.m. EDT Ottawa local time**

Responses submitted after the submission deadline will be rejected. CMHC does not accept any responsibility for responses delivered to any other location or by any other means by the respondent. Respondents are advised to make submissions well before the Submission Deadline. Respondents making submissions near the deadline do so at their own risk. Responses will be deemed to be received when they enter into CMHC's system and CMHC accepts no responsibility for responses sent prior to the deadline that fail to enter into CMHC's system by the Submission Deadline. For the purposes of this section, the time of delivery is deemed to be the time recorded by CMHC's systems.

### **1.6.4 Responses to be submitted in prescribed manner**

Respondents must submit their response to the Submission Location provided under Section 1.6.2. Responses are to be prominently marked with the **RFSO title and number** (see RFSO cover) **in the subject line**, and with the full legal name and return address of the respondent in the body of the email.

Individual files to be submitted in Microsoft or pdf format and named as follows:

**RFSO-000462 + Respondent Name + Stream #**

**Note:** Rich Text formatted or compressed (zipped) documents cannot be opened by CMHC.

### **1.6.5 Amendment of responses**

Respondents may amend their responses prior to the Submission Deadline by submitting the amendment by email prominently marked with the RFSO title and number and the full legal name and return address of the respondent to the Submission Location set out above. Any amendment should clearly indicate which part of the response the amendment is intended to amend or replace. CMHC will assess the responses "as is" and CMHC will not correct or accept any responsibility for errors submitted by the respondent.

### **1.6.6 Withdrawal of responses**

At any time throughout the RFSO process, a respondent may withdraw a submitted response. To withdraw a response, a notice of withdrawal must be sent to the RFSO Contact and must be signed by an authorized representative of the respondent. CMHC is under no obligation to return withdrawn responses.

### **1.6.7 Validity period of responses**

It is a deemed condition of every response that the terms of the response including all terms relating to pricing, shall remain valid and binding on the respondent for the duration of the RFSO process.

[End of Part 1]

## **PART 2 – EVALUATION AND SELECTION**

### **2.1 STAGES OF EVALUATION**

CMHC will conduct the evaluation of responses in the following three (3) stages:

#### **2.1.1 Stage I – Mandatory Submission Requirements**

Stage I will consist of a review to determine which responses comply with all of the mandatory submission requirements due at time of submitting the response, such as licenses or certificates, and detailed in Appendix C – RFSO Specifications, Section G – Mandatory Submission Requirements. Should a respondent not include a submission requirement with its response, the respondent will be notified by CMHC and will have forty eight (48) hours from the time of notification to meet this requirement. Only respondents who meet the mandatory submission requirements will move on to the next stage 2.1.2 A.

#### **2.1.2 Stage II – Evaluation**

Stage II will consist of the following two sub-stages:

##### **A. Mandatory Technical Requirements**

CMHC will review the responses to determine whether the mandatory technical requirements of the Deliverables set out in Appendix C – RFSO Specifications, Section H – Mandatory Requirements have been met. The mandatory technical requirements must be met (assessment on a pass/fail basis) before the rated criteria can be considered. Questions or queries on the part of CMHC as to whether a response has met the mandatory technical requirements will be subject to the verification and clarification process set out in *Part 3 – Terms and Conditions of the RFSO Process*. Only respondents who meet the mandatory technical requirements will move on to the next sub-stage 2.1.2 B.

##### **B. Rated Criteria**

CMHC will evaluate each qualified response on the basis of the rated criteria as set out in Appendix C – RFSO Specifications, Section J – Rated Criteria.

#### **2.1.3 Stage III – Pricing**

Stage III will consist of a scoring of the submitted pricing in accordance with the price evaluation method set out in Appendix B – Pricing Form.

### **2.2 RANKING AND SELECTION**

Based on the evaluation of the responses in Stage II and III, the top ranked respondents per Stream that meet a minimum of 60% in ranking will be selected to enter into a Master Agreement for inclusion on a prequalified supplier list for eligibility to participate in potential Call-up Processes for the procurement of the Deliverables.

Stream 1: Social and Statistical Research- up to twenty (20) respondents

Stream 2: Technical Research- up to twenty (20) respondents

Stream 3: Housing Finance and Market Analysis- up to twenty (20) respondents

## 2.3 NOTIFICATION OF TOP RANKED RESPONDENTS

The qualified respondents selected by CMHC to enter into the Master Agreement in accordance with the process set out in *Part 2 – Evaluation and Selection* will be so notified by CMHC in writing. Each selected respondent will be expected to enter into the Master Agreement within the timeframe specified in the selection notice. Failure to do so may result in the disqualification of the respondent and the selection of another respondent.

## 2.4 SCORING BY THE EVALUATION TEAM

The following scoring matrix has been developed to assist the evaluation Team (a committee of CMHC employees with the right to vote) in the scoring process of the rated criteria detailed in Appendix C, Section J – Rated Criteria:

Score	Evaluation Conclusion	Description
10	<u>Complete and clear</u> description provided that <u>exceeds</u> the requirements of the criteria. No weaknesses or deficiencies that would pose any risk to the respondent's ability to satisfy the requirement.	Outstanding
9	<u>Complete and clear</u> description provided of the respondent's ability to meet the criteria. No evident weaknesses or deficiencies that would pose any risk to the respondent's ability to satisfy the requirement.	Excellent
7-8	<u>Above average description</u> provided of the respondent's ability to consistently meet key criteria. Minimal weaknesses and/or deficiencies could exist, but would not pose any significant risk to the respondent's ability to satisfy the requirement.	Very Good
5-6	<u>Average description</u> provided of the respondent's ability to meet key criteria. Minimal weaknesses and/or deficiencies could exist, but would not pose any significant risk to the respondent's ability to satisfy the requirement.	Good
3-4	<u>Weak information</u> was provided with only a <u>partial description</u> of the respondent's ability to meet the criteria. There are discrepancies and/or deficiencies that pose some risks to the respondent's ability to satisfy the requirement.	Fair
1-2	<u>Very limited</u> information was provided to assess the respondent's ability to meet the criteria. There are serious discrepancies and/or deficiencies that pose important risks to the respondent's ability to satisfy the requirement.	Unsatisfactory
0	<u>Little or no</u> information provided to assess the respondent's ability to meet the criteria.	No Response

Partial scores (for example 1.5, 2.5, 3.5 and so on) may be assigned. Individual scores will be reviewed and tabulated to reach an average score multiplied by the percentage weighting for each rated criteria except for pricing which will be evaluated as described in Appendix B – Pricing Form.

[End of Part 2]

## **PART 3 – TERMS AND CONDITIONS OF THE RFSO PROCESS**

### **3.1 GENERAL INFORMATION AND INSTRUCTIONS**

#### **3.1.1 Respondents to follow instructions**

Respondents should structure their responses in accordance with the instructions in this RFSO. Where information is requested in this RFSO, any response made in a response should reference the applicable section numbers of this RFSO.

#### **3.1.2 Responses in either official language**

The respondent's response may be submitted in English or French.

#### **3.1.3 No incorporation by reference**

The entire content of the respondent's response should be submitted in a fixed form, and the content of websites or other external documents referred to in the respondent's response but not attached will not be considered to form part of its response.

#### **3.1.4 References and past performance**

In the evaluation process, CMHC may include information provided by the respondent's references and may also consider the respondent's past performance or conduct on previous contracts with CMHC or other institutions.

#### **3.1.5 Information in RFSO only an estimate**

CMHC and its advisers make no representation, warranty or guarantee as to the accuracy of the information contained in this RFSO or issued by way of addenda. Any quantities shown or data contained in this RFSO or provided by way of addenda are estimates only, and are for the sole purpose of indicating to respondents the general scale and scope of the Deliverables. It is the respondent's responsibility to obtain all the information necessary to prepare a response in response to this RFSO.

#### **3.1.6 Respondents to bear their own costs**

The respondent will bear all costs associated with or incurred in the preparation and presentation of its response, including, if applicable, costs incurred for interviews or demonstrations.

#### **3.1.7 Response to be retained by CMHC**

The respondent will bear all costs associated with or incurred in the preparation and presentation of its response, including, if applicable, costs incurred for interviews or demonstrations.

#### **3.1.8 Trade agreements**

Respondents should note that procurements falling within the scope of Chapter 5 of the Canadian Free Trade Agreement and/or Chapter 19 of the Canada-European Union (EU) Comprehensive Economic and Trade Agreement (CETA) are subject to that trade agreement but that the rights and obligations of the parties will be governed by the specific terms of this RFSO.

### **3.1.9 No guarantee of volume of work or exclusivity of contract**

This RFSO process will not result in any commitment by CMHC to purchase any goods or services from any respondent, and CMHC is under no obligation to proceed with any Call-up Process for the procurement of the Deliverables. CMHC makes no guarantee of the value or volume of the Deliverables that may be required over the term of the Master Agreement. Neither the Master Agreement, nor any agreement entered into pursuant to the Call-up Process, will be an exclusive contract for the provision of the Deliverables. CMHC may contract with others for goods and services the same as or similar to the Deliverables or may obtain such goods and services internally.

### **3.1.10 Ongoing opportunity for qualification**

At CMHC's discretion, a notice may be posted on the Government of Canada's tender site [www.buyandsell.gc.ca](http://www.buyandsell.gc.ca) to allow new suppliers to become qualified. Existing qualified respondents, who have been issued a Master Agreement, will not be required to submit a new response.

## **3.2 COMMUNICATION AFTER ISSUANCE OF RFSO**

### **3.2.1 Respondents to review RFSO**

Respondents should promptly examine all of the documents comprising this RFSO, and may direct questions or seek additional information in writing by email to the RFSO Contact on or before the Deadline for Questions. No such communications are to be directed to anyone other than the RFSO Contact. CMHC is under no obligation to provide additional information, and CMHC will not be responsible for any information provided by or obtained from any source other than the RFSO Contact. It is the responsibility of the respondent to seek clarification from the RFSO Contact on any matter it considers to be unclear. CMHC will not be responsible for any misunderstanding on the part of the respondent concerning this RFSO or its process.

### **3.2.2 All new information to respondents by way of addenda**

This RFSO may be amended only by addendum in accordance with this section. If CMHC, for any reason, determines that it is necessary to provide additional information relating to this RFSO, such information will be communicated to all respondents by addendum. Each addendum forms an integral part of this RFSO and may contain important information, including significant changes to this RFSO. Respondents are responsible for obtaining all addenda issued by CMHC. In the Submission Form (Appendix A), respondents should confirm their receipt of all addenda by setting out the number of each addendum in the space provided.

### **3.2.3 Post-deadline addenda and extension of submission deadline**

If CMHC determines that it is necessary to issue an addendum after the Deadline for Issuing Addenda, CMHC may extend the Submission Deadline for a reasonable period of time.

### **3.2.4 Verify, clarify and supplement**

When evaluating responses, CMHC may request further information from the respondent or third parties in order to verify, clarify or supplement the information provided in the respondent's response including but not limited to clarification with respect to whether a response meets the mandatory technical requirements set out in Appendix C – RFSO Specifications, Section H – Mandatory Technical Requirements. CMHC may revisit and re-evaluate the respondent's response or ranking on the basis of any such information.

### **3.3 NOTIFICATION AND DEBRIEFING**

#### **3.3.1 Notification to other respondents**

Once the selected respondents and CMHC have entered into a Master Agreement, the other respondents will be notified of the outcome of the RFSO process.

#### **3.3.2 Debriefing**

Respondents may request a debriefing after receipt of a notification of the outcome of the RFSO process. All requests must be in writing to the RFSO Contact and must be made within thirty (30) days of such notification. The intent of the debriefing information session is to aid the respondent in presenting a better response in subsequent procurement opportunities. Any debriefing provided is not for the purpose of providing an opportunity to challenge the RFSO process or its outcome.

Debriefings will be provided in writing.

#### **3.3.3 Procurement protest procedure**

If a respondent wishes to challenge the RFSO process, it should provide written notice to the RFSO Contact in accordance with the applicable trade agreement. The notice must provide a detailed explanation of the respondent's concerns with the procurement process or its outcome.

### **3.4 CONFLICT OF INTEREST AND PROHIBITED CONDUCT**

#### **3.4.1 Conflict of Interest**

CMHC may disqualify a respondent for any conduct, situation or circumstances determined by CMHC, in its sole and absolute discretion, that constitute a "Conflict of Interest", as defined in the Submission Form (Appendix A).

#### **3.4.2 Disqualification for prohibited conduct**

CMHC may disqualify a respondent or terminate any contract subsequently entered into if CMHC determines that the respondent has engaged in any conduct prohibited by this RFSO.

#### **3.4.3 Prohibited respondent communications**

Respondents must not engage in any communications that could constitute a Conflict of Interest and should take note of the Conflict of Interest declaration set out in the Submission Form (Appendix A).

#### **3.4.4 Respondent not to communicate with media**

Respondents must not at any time directly or indirectly communicate with the media in relation to this RFSO or any agreement entered into pursuant to this RFSO without first obtaining the written permission of the RFSO Contact.

#### **3.4.5 No lobbying**

Respondents must not, in relation to this RFSO or the evaluation and selection process, engage directly or indirectly in any form of political or other lobbying whatsoever to influence the selection of successful respondent(s).

### **3.4.6 Illegal or unethical conduct**

Respondents must not engage in any illegal business practices, including activities such as bid-rigging, price-fixing, bribery, fraud, coercion or collusion. Respondents must not engage in any unethical conduct, including lobbying (as described above) or other inappropriate communications; offering gifts to any employees, officers, agents, appointed officials or other representatives of CMHC; deceitfulness; submitting responses containing misrepresentations or other misleading or inaccurate information; or any other conduct that compromises or may be seen to compromise the competitive process.

### **3.4.7 Past performance or past conduct**

CMHC may prohibit a supplier from participating in a procurement process based on past performance or based on inappropriate conduct in a prior procurement process, including but not limited to the following:

- (a) illegal or unethical conduct as described above;
- (b) the refusal of the supplier to honour submitted pricing or other commitments; or
- (c) Any conduct, situation or circumstance determined by CMHC, in its sole and absolute discretion, to have constituted a Conflict of Interest.

## **3.5 CONFIDENTIAL INFORMATION**

### **3.5.1 Confidential information of respondent**

A respondent should identify any information in its response or any accompanying documentation supplied in confidence for which confidentiality is to be maintained by CMHC. The confidentiality of such information will be maintained by CMHC, except as otherwise required by law or by order of a court or tribunal. Respondents 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. Respondents are also advised that their responses may, as necessary, be disclosed on a confidential basis, to CMHC's advisers retained to advise or assist with the RFSO process, including the evaluation of responses. If a respondent has any questions about the collection and use of personal information pursuant to this RFSO, questions are to be submitted to the RFSO Contact.

## **3.6 PROCUREMENT PROCESS NON-BINDING**

### **3.6.1 No Contract A and No Claims**

This procurement process is not intended to create and will not create a formal legally binding bidding process and will instead be governed by the principles of law applicable to commercial negotiations. For greater certainty and without limitation:

- (a) this RFSO will not give rise to any Contract A-based concept or any other similar legal concepts or principles that may be applicable to the procurement process; and
- (b) Neither the respondent nor CMHC will have the right to make any claims (in contract, tort, or otherwise) against the other with respect to the selection of respondents, a decision to reject a response or disqualify a respondent, or a decision of the respondent to withdraw its response.

Notwithstanding the foregoing or anything to the contrary herein, CMHC's total liability to respondent for any cause of action arising out of or in relation to this RFSO process, giving rise to liability, whether in contract or in tort, shall be limited to the reasonable costs incurred by respondent in preparing its response for matters relating to this RFSO process. In no event, whether in contract or in tort shall CMHC be liable for any indirect, consequential, exemplary, punitive, incidental, or special damages or lost profits, even if CMHC has been advised of the possibility of such damages in advance.

### **3.6.2 No legal relationship or obligation**

No legal relationship or obligation regarding the procurement of any good or service will be created between the respondent and CMHC by this RFSO process.

### **3.6.3 Cancellation**

CMHC may cancel or amend the RFSO process without liability at any time.

## **3.7 GOVERNING LAW AND INTERPRETATION**

The Terms and Conditions of RFSO Process (Part 3)

- (a) are intended to be interpreted broadly and independently (with no particular provision intended to limit the scope of any other provision);
- (b) are non-exhaustive and will not be construed as intending to limit the pre-existing rights of the parties to engage in pre-contractual discussions in accordance with the common law governing direct commercial negotiations; and
- (c) Are to be governed by and construed in accordance with the laws of the province of Ontario and the federal laws of Canada applicable therein.

[End of Part 3]

**APPENDIX A – SUBMISSION FORM**

**1. RESPONDENT INFORMATION**

Please fill out the following form, naming one person to be the contact for this RFSSO response and for any clarifications or communication that might be necessary.	
Procurement Business Number (PBN):	
Full Legal Name of Respondent:	
Any Other Relevant Name under which Respondent Carries on Business:	
Street Address:	
City, Province/State:	
Postal Code:	
Phone Number:	
Company Website (if any):	
Respondent Contact Name and Title:	
Respondent Contact Phone:	
Respondent Contact Email:	

**2. RESPONDENT SUBMISSION OF RESPONSE(S)**

**The respondent acknowledges submitting a response for the following streams:  
(Please fill out the following form: y = response n = no response)**

<b>Stream</b>	<b>Response</b>
Stream 1: Social and Statistical Research	
Stream 2: Technical Research	
Stream 3: Housing Finance and Market Analysis	

**3. ACKNOWLEDGMENT OF NON-BINDING PROCUREMENT PROCESS**

The respondent acknowledges that this RFSSO process will be governed by the terms and conditions of the RFSSO and that, among other things, such terms and conditions confirm that this procurement process does not constitute a formal, legally binding bidding process (and for greater certainty, does not give rise to a Contract A bidding process contract) and that no legal relationship or obligation regarding the procurement of any good or service will be created between CMHC and the respondent unless and until CMHC and the respondent execute a written agreement for the Deliverables pursuant to the Call-up Process.

#### **4. ABILITY TO PROVIDE DELIVERABLES**

The respondent has carefully examined the RFSO documents and has a clear and comprehensive knowledge of the Deliverables required. The respondent represents and warrants its ability to provide the Deliverables in accordance with the requirements of the RFSO.

#### **5. ADDENDA**

The respondent has read and accepted all addenda issued by CMHC prior to the deadline for issuing addenda. The respondent is requested to confirm that it has received all addenda by listing the addenda numbers, or if no addenda were issued by writing the word "None", on the following line: \_\_\_\_\_ . Respondents who fail to complete this section will be deemed to have received all posted addenda.

#### **6. NO PROHIBITED CONDUCT**

**The respondent declares that it has not engaged in any conduct prohibited by this RFSO.**

#### **7. CONFLICT OF INTEREST**

For the purposes of this section, the term "Conflict of Interest" includes, but is not limited to, any situation or circumstance where:

- (a) in relation to the RFSO process, the respondent has an unfair advantage or engages in conduct, directly or indirectly, that may give it an unfair advantage, including but not limited to (i) having, or having access to, confidential information of CMHC in the preparation of its response that is not available to other respondents; (ii) communicating with any person with a view to influencing preferred treatment in the RFSO process (including but not limited to the lobbying of decision makers involved in the RFSO process); or (iii) engaging in conduct that compromises, or could be seen to compromise, the integrity of the open and competitive RFSO process or render that process non-competitive or unfair; or
- (b) in relation to the performance of its contractual obligations under a contract for the Deliverables, the respondent's other commitments, relationships or financial interests (i) could, or could be seen to, exercise an improper influence over the objective, unbiased and impartial exercise of its independent judgement, or (ii) could, or could be seen to, compromise, impair or be incompatible with the effective performance of its contractual obligations.

For the purposes of section 7(a)(i) above, respondents should disclose the names and all pertinent details of all individuals (employees, advisers, or individuals acting in any other capacity) who (1) participated in the preparation of the response; **AND** (2) were employees of CMHC within twelve (12) months prior to the Submission Deadline. Any former public office holder must be in compliance with the post-employment provisions of the Conflict of Interest and Post-Employment Code for Public Office Holders (2012) in order to derive a direct benefit from any contract which may arise from this RFSO.

If the box below is left blank, the respondent will be deemed to declare that (a) there was no Conflict of Interest in preparing its response; and (b) there is no foreseeable Conflict of Interest in performing the contractual obligations contemplated in the RFSO.

Otherwise, if the statement below applies, check the box.

- The respondent declares that there is an actual or potential Conflict of Interest relating to the preparation of its response, and/or the respondent foresees an actual or potential Conflict of Interest in performing the contractual obligations contemplated in the RFSO.

If the respondent declares an actual or potential Conflict of Interest by marking the box above, the respondent must set out below details of the actual or potential Conflict of Interest:

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## **8. DISCLOSURE OF INFORMATION**

The respondent warrants that neither the respondent nor one or more of the respondent's directors, officers or employees have been convicted or sanctioned for an offence involving bribery, corruption or workplace safety at any time. If such convictions exist, the details of such convictions or sanctions are to be disclosed in the respondent's proposal.

It is understood that CMHC will have the sole discretion to determine whether such convictions are grounds for removing the respondent from further consideration in the RFSO process or requiring that the respondent exclude certain employees from involvement in the provision of goods and/or services contemplated herein.

The respondent hereby agrees that any information provided in this response, even if it is identified as being supplied in confidence, may be disclosed where required by law or by order of a court or tribunal. The respondent hereby consents to the disclosure, on a confidential basis, of this response by CMHC to the advisers retained by CMHC to advise or assist with the RFSO process, including with respect to the evaluation of this response.

## **9. SECURITY CLEARANCE**

The respondent agrees that it and any of its employees or subcontractors, if applicable, will, at the request of CMHC comply with security screening as outlined in Appendix C, Section E - Security.

## **10. SO MASTER AGREEMENT**

The respondent agrees that by submitting a response to this RFSO it has read and understood and will comply with the general terms and conditions set out in Appendix D – Master Agreement, which will govern every Call-up issued under this SO Master Agreement.

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Signature of Witness

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Signature of Respondent Representative

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Name of Witness

---

Name of Respondent Representative

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Title of Respondent Representative

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Date

I have the authority to bind the respondent.

## APPENDIX B – PRICING FORM

### 1. Instructions on how to complete pricing form

- (a) Table 1: Respondents must provide the fixed hourly rate per resource within the applicable position/role.
- (b) Rates shall be provided in Canadian funds, inclusive of all applicable duties and taxes except for HST, which should be itemized separately.
- (c) Rates quoted by the respondent shall be all-inclusive and shall include all labour and material costs, all insurance costs, all administrative fees, all costs of delivery, all costs of installation and set-up, including any pre-delivery inspection charges, and all other overhead, including any fees or other charges required by law.
- (d) When a Final Report is required in both official languages respondents must provide the translation. Translation costs must be built into the response for Call-Up and approved by CMHC. Pricing to align with industry standard reasonable prices.
- (e) Rates shall be applicable during the two (2) year term and two (2) possible one-year optional terms of the resulting SO Master Agreement
- (f) Travel expenses, if applicable, are considered separate expenses and will be reimbursed in accordance with CMHC's Travel Policy outlined in Appendix D - Master Agreement. Any Candidate relocation expenses are subject to special pre-approvals and will be at the sole discretion of CMHC

### 2. Evaluation of pricing

Pricing is worth 30% points of the total score.

Pricing will be scored based on a relative pricing formula using the rates set out in the Pricing Form. Each respondent will receive a percentage of the total possible points allocated to price for the particular stream it has bid on, which will be calculated in accordance with the following formula:

Table 1 Formula:

*Lowest total overall average hourly rate per 4 years ÷ respondent's total overall average hourly rate per 4 years x 30% = respondent's pricing points*

### 3. Pricing Form R.4

*Note:* Respondents must re-create the exact table as per below form, for their response submission. Pricing to be submitted as a separate form.

#### Pricing – Rates (30%)

Table 1: Researchers

Stream 1- Social and Statistical Research:

<b>STREAM 1- Social and Statistical Research</b>		Hourly CAD\$ Rate/Resource Level			
		Year 1	Year 2	Year 3	Year 4
Position/Roles	1. Project Manager/Team Leader	\$	\$	\$	\$
	2. Senior Researcher/Principal Investigator	\$	\$	\$	\$
	3. Researcher	\$	\$	\$	\$
Total Average Hourly Rate Per Year		\$	\$	\$	\$
Total Overall Average Hourly Rate per 4 Years		\$			

Stream 2- Technical Research

<b>STREAM 2- Technical Research</b>		Hourly CAD\$ Rate/Resource Level			
		Year 1	Year 2	Year 3	Year 4
Position/Roles	1. Project Manager/Team Leader	\$	\$	\$	\$
	2. Senior Researcher/Principal Investigator	\$	\$	\$	\$
	3. Researcher	\$	\$	\$	\$
Total Average Hourly Rate Per Year		\$	\$	\$	\$
Total Overall Average Hourly Rate per 4 Years		\$			

Stream 3- Housing Finance and Market Analysis

STREAM 3- Housing Finance and Market Analysis		Hourly CAD\$ Rate/Resource Level			
		Year 1	Year 2	Year 3	Year 4
Position/Roles	1. Project Manager/Team Leader	\$	\$	\$	\$
	2. Senior Researcher/Principal Investigator	\$	\$	\$	\$
	3. Researcher	\$	\$	\$	\$
Total Average Hourly Rate Per Year		\$	\$	\$	\$
Total Overall Average Hourly Rate per 4 Years		\$			

## **APPENDIX C – RFSO SPECIFICATIONS**

### **A. BACKGROUND**

CMHC undertakes and supports research on housing under Part IX of the National Housing Act (NHA). Canada's National Housing Strategy (NHS), launched in 2018, includes additional investments in research and demonstration initiatives to address data and knowledge gaps, support informed decision making in the housing sector, enhance sector innovation, and inform federal housing policy development. In line with CMHC's new corporate strategy and aspiration, the Research division developed a new three-year (2020-23) research plan focused on the delivery of research across four priority areas: housing supply, housing needs, housing finance, and the outcomes of NHS investments in affordable housing.

### **B. THE DELIVERABLES**

CMHC is seeking respondents to provide services in the following streams:

#### **Stream 1: Social and Statistical Research**

#### **Stream 2: Technical Research**

#### **Stream 3: Housing Finance and Market Analysis**

### **SCOPE OF WORK**

#### **MANDATORY MINIMUM REQUIREMENT FOR RESEARCH PROJECT TEAMS - Applicable to all Streams 1, 2 and 3**

In all research areas, up to three categories of personnel will be required, depending on the project size. The functions and experience for each of the three personnel categories are listed below. Respondents do not have to include personnel in all three categories to be successful; however, respondents must have at least one person who meets the minimum requirements for a Senior Researcher/Principal Investigator and Project Manager/Team Leader. The Senior Researcher/Principal Investigator and Project Manager/Team Leader may be the same person or two separate individuals. **See Appendix F- Template 1: Respondent Qualifications: Mandatory Minimum Requirements: Research Project Team (MTR.2)**

#### ***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 managing project resources, including project staff and sub-contractors, providing overall quality assurance for the project and its deliverables, and serving as primary point of contact with CMHC.

#### ***Experience:***

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

#### ***SENIOR RESEARCHER/PRINCIPAL INVESTIGATOR:***

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

***Experience:***

- At least five (5) years' experience related to the research area(s);
- Recently completed at least five (5) significant projects related to the research area(s); and,
- A graduate or post-graduate university degree in the social sciences, urban and/or regional planning, public policy, economics, engineering, architecture, building sciences, environmental sciences, or related field or demonstrated equivalent experience.

**RESEARCHER:**

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

***Experience:***

- Experience working on a minimum of three (3) projects/assignments related the research area(s); and,
- Post-secondary education (i.e. degree, diploma or certificate) in the social sciences, urban and/or regional planning, public policy, economics, engineering, architecture, building sciences, environmental sciences, or related field.

**RESEARCH COMPETENCIES AND SPECIALIZED KNOWLEDGE**

This section outlines the qualifications, knowledge, experience, research competencies and areas of specialization that CMHC is seeking in each of the three research streams (for Senior Researcher and Researcher roles). Respondents will be evaluated on the extent to which the personnel submitted under this RFSO have the qualifications and experience, research competencies and areas of specialization that CMHC is seeking. Respondents are encouraged to identify all research competencies and specialized knowledge areas that apply to them as this information will be used to select firms for Call-ups (see Appendix G- Template 2: Qualifications and experience, research competencies, and specialized knowledge).

**STREAM 1- SOCIAL AND STATISTICAL RESEARCH**

**Resource qualifications and expertise:**

1. Depending on the role in the Project Team (Senior Researcher or Researcher), a post-secondary, graduate or post-graduate university degree, preferably in the social sciences, urban and/or regional planning, public policy, economics and related fields or demonstrated equivalent experience; and,
2. Demonstrated experience using social science theories, analytical approaches, and quantitative and/or qualitative research methods.

## **Research Competency Areas:**

1. Undertaking scoping reviews and/or literature reviews of peer-reviewed journal publications, government documents, industry reports and other 'grey literature' to identify knowledge gaps and analyze key themes and emerging issues and trends in the housing sector in Canada and internationally.
2. Designing and implementing high quality research projects, including validation and assessment of research approaches, identification of appropriate methodologies, development and testing of data collection methods, testing and use of analytical frameworks, and communication of research findings in different formats, targeted to specific audiences.
3. Application of Gender-Based Analysis Plus (GBA+) (see definition by Status of Women Canada/Women and Gender Equality) in research design, implementation, and analysis and communication of findings.
4. Quantitative research methods, including primary data collection from survey and other data sources, mining of existing data sets (e.g. Census, Canadian Housing Survey, administrative data), inferential and causal analysis and econometric modelling using statistical tools including SPSS, SAS, EViews, Stata, R or other similar statistical software, including experience with informed consent and privacy and confidentiality protocols, where appropriate. Ability to work with large data sets, including those available at Statistics Canada Research Data Centres is an asset.
5. Qualitative research methods, including primary data collection and analysis from surveys, interviews, focus groups, and case studies, including experience with informed consent and privacy and confidentiality protocols. Ability to code and analyze large qualitative data sets, including use of software (e.g. NVivo, Dedoose, Atlas.ti or comparable) for qualitative qualitative analysis is an asset.
6. Community-based research involving populations that are vulnerable, as defined in the NHS (e.g., newcomers and refugees, racialized persons or communities, women and children fleeing violence, seniors, people who have experienced homelessness). Access to an academic or community Research Ethics Board to enable review and approval of research involving populations experiencing vulnerability is a requirement.
7. Mixed-method research involving integration of qualitative and quantitative data collection and analysis.
8. Application of Geographic Information Science (GIS) to collect geospatial data from a variety of sources to enable data visualization, analysis and modelling using GIS software.
9. Impact evaluation employing a broad range of longitudinal methods and methodologies that allow for the analysis of causal attribution and includes examining unintended consequences.

## **Specialized Knowledge Areas:**

1. The social and affordable housing landscape in Canada including the history of sector transformations, division of responsibilities across levels of government in Canada, the role and contemporary challenges facing public and non-profit housing providers, and the social, financial and technical dimensions of affordable housing provision throughout the lifecycle (i.e. construction, repair, renewal, replacement).

2. Social policy and its interconnection with housing policy (i.e. family support, education, poverty reduction, unemployment support and training, pension and health care, etc.), based on the Canadian and international experience.
3. Transformations, conditions and trends in rental housing and rental markets in Canada and internationally, including implications for housing supply, affordability and need.
4. Knowledge of the urban and regional planning system in the Canadian context including, but not limited to, the application of urban economics, social and environmental analyses to understand issues and trends related to housing, infrastructure, community design and other dimensions or urban/regional land use and development.
5. Knowledge of, and demonstrated ability to work with, municipal, provincial/territorial and non-profit organizations' data sets.
6. The housing needs of populations experiencing different types vulnerability in the Canadian housing system, including the lived experience of housing need and tailored approaches to improve housing stability, social inclusion, and other outcomes (e.g. housing models, supports and services etc.).
7. Housing conditions and housing needs in the North, including the current and future impacts of climate change on northern housing and populations.
8. The right to housing, including expertise in legal and legislative dimensions of the right to housing in Canada and internationally.
9. Other: Use this field to identify any additional relevant specialized knowledge areas in addition to those specified above.

## **STREAM 2- TECHNICAL RESEARCH**

### **Resource qualifications and expertise:**

1. Depending on the role in the Project Team (Senior Researcher or Researcher), a post-secondary, graduate or post-graduate university degree in urban and/or regional planning, architecture, engineering, building science, environmental sciences or other relevant fields or demonstrate equivalency with a combination of knowledge and experience;
2. Demonstrated experience applying scientific and/or engineering principles, analytical approaches and empirical research methods; and,
3. Demonstrated experience in planning and implementing technical or research projects relevant to the residential sector.

### **Research Competency Areas:**

1. Conducting environmental scans, literature searches and reviews of peer-reviewed journal publications, government documents, industry reports and other grey literature to identify knowledge gaps and analyze key themes and emerging issues and trends in the housing sector in Canada and internationally.
2. Designing and implementing high quality research projects, including validation and assessment of research approaches, identification of appropriate methodologies, development and testing of data collection methods, testing and use of analytical frameworks, and communication of research findings in different formats, targeted to specific audiences.

3. Developing questionnaires and conducting surveys of occupants (potentially populations experiencing vulnerability), building owners and managers to assess perception of technical performance (e.g., indoor air quality, comfort, ease of operation and maintenance, energy and water efficiency, etc.); including experience with informed consent and privacy and confidentiality protocols, where appropriate.
4. Identifying data needs; developing data collection methods; collection, storage, retrieval and usage protocols; mining of existing data sets (e.g. utility data), analyzing data using statistical tools; ability to work with large data sets, including but not limited to those available at Statistics Canada Research Data Centres.
5. Application of Gender-Based Analysis Plus (GBA+) (see definition by Status of Women Canada/Women and Gender Equality) in research design, implementation, and analysis and communication of findings.
6. Preparation of well organized, thorough, articulate and technically robust research progress reports, final reports, research summaries, presentations, papers and articles, including in plain language reports for broader audiences, summaries and presentations containing context, findings, conclusions and recommendations.
7. Dissemination of technical or research findings, lessons learned and knowledge gained from the research in multiple information products via multiple channels and venues.

## Specialized Knowledge Areas:

1. **New Housing Construction Costs:** Knowledge and understanding of low, mid and high-rise residential construction systems, materials, equipment, processes and supply chains; construction costs; innovative technologies and practices that reduce capital and project delivery costs; factors and trends that impact and influence capital costs.
2. **Existing Housing Repair and Renewal Costs:** Knowledge and understanding of low, mid and high-rise residential repair and renewal strategies, systems, materials, equipment, processes and supply chains; repair and renewal costs; conditions that cause material, system, equipment failures, innovative technologies and practices that reduce repair and renewal costs; factors and trends that influence repair and renewal needs and costs.
3. **Existing Housing Operation and Maintenance (O&M) Costs:** Knowledge and understanding of low, mid and high-rise residential operations and maintenance regimes and needs; property management structure and operations; O&M expenses; building condition assessments and reserve fund studies; O&M-related system, equipment and material failures, innovative technologies, practices and systems to reduce O&M costs.
4. **Climate Change Mitigation (Technologies and Practices):** Knowledge and understanding of residential energy consumption reduction and decarbonization design, technologies, practices and strategies for new construction, retrofit and renewal projects including building envelope measures, HVAC systems, lighting, equipment, renewable energy systems, energy recovery systems, co-generation system or other innovative technologies and practices, energy performance optimization, control systems, implementation of best practices to improve energy efficiency; occupant engagement strategies; lifecycle embodied energy and carbon assessment; technology assessments; cost and energy optimized pathways to reducing energy consumption and GHG emissions; knowledge of government, non-government organization, utility and private sector residential-related climate change action plans and policies.
5. **Climate Change Mitigation (Modelling):** Building energy consumption and GHG emission reduction performance modelling and analysis, parametric analysis and optimization, developing baseline models, as-designed models, conducting model calibration and validation, analysis of results, cost and energy optimization, utility bill reconciliation; residential building stock level modelling.
6. **Climate Change Resilience:** Knowledge and understanding of impact of climate change on housing and communities (including vulnerable populations); knowledge of climate resiliency technologies, practices and strategies at the building and community level and related costs; knowledge of government, non-government organization, utility and private sector residential-related climate change resilience plans and policies.
7. **Measurement and Verification:** Knowledge and understanding of approaches to documenting design characteristics and targeted performance and measuring and verifying the as-built conditions; data collection methods and systems; installing instrumentation; measuring and documenting in-situ building characteristics, operational regimes, and performance including energy and water consumption; documenting accessibility features; key innovations to achieve performance objects.
8. **Post Occupancy Evaluations:** Knowledge and understanding of approaches and methodologies for building energy, water and indoor environmental performance monitoring and analysis within occupied buildings; data collection methodologies and instrumentation for occupied and non-occupied spaces; data retrieval and minimization of data losses; utility bill analysis; property management and tenant consultations or surveys on indoor air quality, comfort conditions, ease of operations, etc.; analyses that characterize energy/water use and building performance against project objectives and sector baselines; qualitative and quantitative approaches for housing durability and resiliency analysis; technology assessments and reporting.

9. **Accessible, Adaptable Housing:** Knowledge and understanding of needs of occupants with disabilities; technologies and practices to provide and enhance accessibility for full spectrum of disabilities; costs of including accessibility features in new and existing residential buildings; codes, standards and regulations; voluntary labelling and rating systems; accessibility continuum (Visitability, Universal Design, Adaptability); adaptability features and designs; implementation strategies for new and existing buildings.
10. **Northern Housing:** Knowledge and understanding of the unique technical challenges of designing, delivering, building, operating and preserving housing in northern and remote locations and on-reserve.
11. **Other:** Use this field to identify any additional relevant specialized knowledge areas in addition to those specified above.

### **STREAM 3- HOUSING FINANCE AND MARKET ANALYSIS**

#### **Resource qualification and expertise:**

1. Depending on the role in the Project Team (Senior Researcher or Researcher), a post-secondary, graduate or post-graduate university degree in economics with strong mathematical and/or statistical background; and,
2. Proficiency using advance relevant data management and analytical software, including SAS, EVIEW, MATLAB or other statistical software.

#### **Research Competency Areas:**

1. Undertaking scoping reviews and/or literature reviews of peer-reviewed journal publications, government documents, industry reports and other 'grey literature' to identify knowledge gaps and analyze key themes and emerging issues and trends in the housing sector in Canada and internationally.
2. Designing and implementing high quality research projects, including validation and assessment of research approaches, identification of appropriate methodologies, development and testing of data collection methods, testing and use of analytical frameworks, and communication of research findings in different formats, targeted to specific audiences.
3. Quantitative research methods, including primary data collection from survey and other data sources, mining of existing data sets (e.g., Census, administrative data), and analysis using statistical tools (as detailed under Qualifications), including experience with informed consent and privacy and confidentiality protocols, where appropriate. Ability to work with large data sets, including those available at Statistics Canada Research Data Centres and/or other housing related Canadian and international databases is an asset.
4. Qualitative research methods, including primary data collection and analysis from surveys, interviews, focus groups, and case studies, including experience with informed consent and privacy and confidentiality protocols.
5. Application of Gender-Based Analysis Plus (GBA+) (see definition by Status of Women Canada/Women and Gender Equality) in research design, implementation, and analysis and communication of findings.
6. Advanced economic modelling techniques, including, but not be limited to, computational spatial general equilibrium models with heterogeneous agents; Dynamic Stochastic General Equilibrium (DSGE) models; Heterogeneous Agent New Keynesian (HANK) models; and/or, computational agent-based models.

7. Undertaking economic forecasting and/or simulation models to project housing market outcomes under real world, projected and proposed parameters.
8. Research methods regarding the financial impacts of climate change and natural disasters and the impact of climate events and natural disasters on housing market conditions.
9. Undertaking big data analytics including machine learning/artificial intelligence and visualization techniques.

**Specialized Knowledge Areas:**

1. Housing market analysis
2. Housing economics and finance
3. Housing finance of the multi-unit sector
4. The housing finance regulatory framework (e.g., OSFI, BIS)
5. Housing construction financing
6. Housing finance technology (FinTech, PropTech, etc.)
7. Credit risk, financial markets and financial product innovation analysis
8. Mortgage lending processes and data
9. Macro-prudential regulation and policy
10. The role of government and the private sector in housing finance
11. Other: Use this field to identify any additional relevant specialized knowledge areas in addition to those specified above.

**C. WORK LOCATION**

CMHC positions may be located across Canada and meetings and interviews, in-person or virtually, will take place in a location(s) within Canada identified by CMHC and services may be performed at CMHC or the selected SO Holder’s business location virtually.

**D. TRAVEL**

If travel is required in the execution of the Deliverables by the selected SO Holder, such travel will require written pre-approval by CMHC and will be reimbursed in accordance with CMHC’s Travel Policy as outlined in Appendix D – Master Agreement.

**E. SECURITY**

Employees of the respondent and, if applicable, subcontractors may be required to undergo a criminal records check and/or hold a valid personnel security screening at the level of **RELIABILITY** prior to commencement of any work performed under the SO Master Agreement and must provide the results of the check to CMHC’s corporate security department. CMHC reserves the right to disallow any person to carry out work under the SO Master Agreement on the basis of the results of the criminal records check/security clearance. Each of the respondent’s proposed staff, who do not hold a valid clearance, will be required to complete a “Security Clearance Form” (67934) upon request from CMHC.

**F. CMHC DATA**

The respondent must ensure that all CMHC data (sensitive and/or protected and/or secret information, including personal information), except for regular business communication, will reside in Canada

## G. MANDATORY SUBMISSION REQUIREMENTS

### 1. Submission Form (Appendix A)

Each response must include a Submission Form (Appendix A) completed and signed by an authorized representative of the respondent.

### 2. Pricing Form (Appendix B)

Each response must include a Pricing Form (Appendix B) completed according to the instructions contained in the form.

## H. MANDATORY TECHNICAL REQUIREMENTS

The following will be assessed on a pass/fail basis:

Mandatory Technical Requirement (MTR)	MTR Description
MTR. 1	<b>Data Residency.</b> Respondents must confirm they will comply with the following: CMHC data, while at rest or in transit must stay within the geographical boundaries of Canada and accessed from within Canada. Data residency in Canada is not mandatory for regular business communication that does not include sensitive and/or protected or secret information (including personal information).
MTR. 2	<b>Resource Qualification.</b> Respondents must meet the mandatory minimum requirements for the research project team, as per Appendix C – RFSO Specifications - Scope of Work. <b>Complete Appendix F- Template 1: Respondent Qualifications: Mandatory Minimum Requirements: Research Project Team (MTR.2)</b>

Respondents must provide a statement per each MTR as to how the respondent is in compliance with the mandatory technical requirement(s) outlined above with its response submission.

## I. PRE-CONDITIONS OF AWARD- N/A

## J. RATED CRITERIA

The following tables sets out the categories, weightings and descriptions of the rated criteria of the RFSO.

Rated criteria category- STREAM 1: Social and Statistical Research	Weighting
R.1 Experience and qualifications of the organization	10 %
R.2 Project Management and Communication	10 %
R.3 Response to Appendix G-Template 2: Qualifications and Experience, Research Competencies and Specialized Knowledge	50%
R.4 Pricing Form (See Appendix B for details)	30 %

<b>Total</b>	100%
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<b>Rated criteria category- STREAM 2: Technical Research</b>	<b>Weighting</b>
R.1 Experience and qualifications of the organization	10 %
R.2 Project Management and Communication	10 %
R.3 Response to Appendix G-Template 2: Qualifications and Experience, Research Competencies and Specialized Knowledge	50 %
R.4 Pricing Form (See Appendix B for details)	30%
<b>Total</b>	100%

<b>Rated criteria category- STREAM 3: Housing Finance and Market Analysis</b>	<b>Weighting</b>
R.1 Experience and qualifications of the organization	10 %
R.2 Project Management and Communication	10 %
R.3 Response to Appendix G-Template 2: Qualifications and Experiences, Research Competencies and Specialized Knowledge	50%
R.4 Pricing Form (See Appendix B for details)	30%
<b>Total</b>	100%

**Response for rated criteria**

Each respondent should provide the following in its response in the same order as listed below for each applicable Stream (1, 2 and/or 3).

**Note:** Page limitations are per single-sided pages, minimum font size 11.

**R. 1 Experience and qualifications of the organization (page limit: 2)**

R.1.1 Provide a Cover letter detailing the following:

- a) Provide a brief description of your organization (overview and history);
- b) Provide a description of the experience and qualifications of the organization, including any particular areas of specialization;
- c) A description of your organization’s experience with Government agencies (such as Crown Corporations and/or other organizations with a public mandate);
- d) The names of the personnel included in the Offer and category (Project Manager, Senior Researcher and Researcher);
- e) The locations of primary and all other offices that would be servicing any Call-ups issued from this SO; and,

- f) Describe if your organization has a diverse workforce specifically to women, indigenous people, persons with disabilities and visible minorities. Please describe your anti-racism policy.

## **R.2 Project Management and Communication (page limit: 2)**

R.2.1 Respondents to provide a response to the following:

- a) Project Management: The respondent shall describe its project management organizational structure including reporting levels and lines of authority for the personnel in this offer.
- b) Quality Control: The respondent shall briefly 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 respondent 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 respondent shall identify its interface point with CMHC how issues and difficulties will be resolved.

## **R. 3 Response to Appendix G-Template 2: Qualifications and Experience, Research Competencies and Specialized Knowledge.**

R.3.1 For each member of the proposed project team (Senior Researcher and Researcher only), provide the information requested to demonstrate:

- a) Qualifications and Experience (**Complete Appendix G - Template 2: Part 1: Qualifications and Experience**);
- b) Research Competencies (**Complete Appendix G - Template 2: Part 2: Research and Competencies**) and;
- c) Specialized Knowledge (**Complete Appendix G - Template 2: Part 3: Specialized Knowledge**)

R.3.2 Provide résumés for all project personnel who are listed in the Response to the Statement of Goods and/or Services

R.3.3 Provide one example each of the following research products produced within the last five years:

- a) research/technical report;
- b) plain language publication/web content etc.;
- c) concise briefing/summary/abstract; and,
- d) presentation.

R.3.4 Provide additional reports that are attributable to the personnel in the Offer referenced in Template 2, and for which hyperlinks cannot be provided.

## **APPENDIX D – MASTER AGREEMENT**

In accordance with Section 1.3 Master Agreement of this RFSO, the following general terms and conditions will govern every Call-up issued under this Standing Offer (“SO”) Master Agreement.

Respondents (“SO Holder”) must be able to comply with all terms and conditions set out herein.

### **Article 1.0 - THE SERVICES**

- 1.1** The SO Holder covenants and agrees to provide Housing Research Services on an ‘as and when needed’ basis for Stream 1: Social and Statistical Research and/or Stream 2: Technical Research and/or Stream 3 Housing Finance and Market Analysis. CMHC will issue a written contract (“Call-up”) to the SO Holder when CMHC requires the SO Holder’s Housing Research (“Services”). Each Call-up issued shall be subject to the terms and conditions of this SO Master Agreement. Upon the issuance of a Call-up, the SO Holder shall provide the Services as detailed in the Call-up and in accordance with the Services outlined in Schedule "A", to be covered under the SO Master Agreement.
- 1.2** The SO Holder acknowledges that the SO Master Agreement does not guarantee that CMHC will issue a Call-up to the SO Holder and that Call-ups will be issued at the sole discretion of CMHC based on the Call-up process described in Schedule "A", Call-ups from a SO Master Agreement.
- 1.3** Both parties will comply with all federal, provincial, and local laws, ordinances, rules and regulations applicable to its activities and obligations under this SO Master Agreement.

### **Article 2.0 - TERM OF THE SO MASTER AGREEMENT**

- 2.1** The term of the SO Master Agreement shall be for a period of Two (2) years commencing on August 1, 2021 and ending on July 31, 2023 (the “Term”). CMHC reserves the right to renew the Standing Offer for Two (2) one-year periods (the “Renewal Term”).

#### **2.2 Termination**

##### ***No fault termination***

Notwithstanding article 2.1 above, i. either party may terminate the SO Master Agreement for any reason with no penalty or charge by giving thirty (30) days written notice to the other party at any time during the Term; and ii) CMHC may terminate a Call-up issued under this SO Master Agreement for any reason with no penalty or charge by giving five (5) days written notice at any time during the term of the Call-up.

##### ***Termination for Default of SO Holder***

CMHC may, by giving five (5) days prior written notice to the SO Holder, terminate this SO Master Agreement without penalty or charge for any of the following reasons:

1. The SO Holder commits a material breach of its duties under this SO Master Agreement and/or Call-up, unless the SO Holder cures such breach and indemnifies CMHC for any resulting damage or loss, both in a manner satisfactory to CMHC in its sole, absolute and non-reviewable discretion, within twenty (20) calendar days of receipt of written notice of breach from CMHC;
2. The SO Holder commits numerous breaches of its duties under this SO Master Agreement and/or Call-up that collectively constitute a material breach;
3. There is a change in control of the SO 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 SO Holder are acquired by any entity, or the SO Holder is merged with or into another entity to form a new entity, unless the SO Holder demonstrates to the satisfaction of CMHC that such event will not adversely affect its ability to perform the services under this SO Master Agreement; or
4. The SO Holder becomes bankrupt or insolvent, or a receiving order is made against the SO 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 SO Holder.

CMHC may terminate this SO Master Agreement and/or Call-up without notice if the SO Holder commits gross misconduct, fraud or other unlawful acts.

#### ***CMHC's Obligations upon Termination***

In the event that a notice of termination is given, and subject to the deduction of any claim which CMHC may have against the SO Holder arising out of the SO Master Agreement or its termination, CMHC will be obliged to make payment for the value of all Services performed to the date of the notice, such value to be determined in accordance with the rate(s) specified in the Call-up. CMHC will make payment within thirty (30) days of the date of the notice or receipt of an invoice submitted by the SO Holder, whichever is later. Upon such payment, it shall have no further obligation or liability of any kind to the SO Holder.

#### ***SO Holder's Obligations upon Termination***

Upon termination of this SO Master Agreement and/or a Call-up or upon delivery of notice of intent to terminate this SO Master Agreement and/or a Call-up, the SO Holder shall promptly review all work in progress and forward it to CMHC. The SO Holder shall provide CMHC with reasonable transitional assistance at the rates specified in the Call-up, or if no rates are specified at the SO Holder's standard rates.

### **Article 3.0 – FINANCIAL**

- 3.1** In consideration of the performance of the services for a Call-up CMHC agrees to pay the SO Holder an amount based on the SO Holder's fees agreed upon in Schedule B - Rates.
- 3.2** Travel Costs. Travel costs are to be estimated based on eligible travel costs which will be incurred directly by the SO Holder to perform the Services that are reasonable and comparable to costs allowed under CMHC Travel Policy, attached hereto as Schedule C – CMHC Travel Policy. The SO Holder is required to complete this Estimate Form (or provide the information contained in the Estimate Form, attached hereto as Schedule D – Travel Estimate Form in another format) and provide it to the designated CMHC Authority for pre-approval. CMHC may, at its sole discretion, not reimburse the SO Holder for the travel costs

where the SO Holder has not completed the Estimate Form and obtained a pre-approval. The SO Holder must also provide appropriate receipts that are satisfactory to CMHC in support of travel costs.

- 3.3** The amount payable to the SO Holder by CMHC pursuant to article 3.1 is inclusive of all taxes, assessments, duties or other levies that may be payable, including any goods and services tax/harmonized sales tax (GST/HST) or retail sales tax (RST). No other taxes, assessments, duties or other levies shall be payable to the SO Holder unless specifically agreed in writing by the SO Holder and CMHC.
- 3.4** Notwithstanding article 3.3 above, GST/HST or RST, to the extent applicable and required to be collected, shall be collected by the SO Holder and shown as a separate item on each invoice. Where the SO Holder is required to collect the GST/HST, the invoice issued by the SO Holder shall show the SO Holder's GST/HST number. Where the SO Holder is also required to collect the Quebec Sales Tax (QST), the invoice shall show the QST number. The SO Holder shall duly remit to the Canada Revenue Agency or the appropriate provincial taxing authorities all taxes payable on the Services.

Non-Canadian-Residence. Any payments made to the SO Holder by CMHC pursuant to article 3.1 in respect of services rendered in Canada by a SO Holder who does not reside 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 amounts payable to the SO Holder, CMHC shall make such withholdings and duly and promptly remit the amount withheld to the Canada Revenue Agency.

### **3.5 Invoicing**

CMHC will issue a Purchase Order (PO) with every Call-up under this SO Master Agreement. The SO Holder cannot i) commence the Services prior to PO and Call-up receipt and ii) cannot invoice prior to performance of the Service. The SO Holder shall submit detailed invoices to CMHC describing the Services provided during the period covered by the invoice. The SO Holder must allow 30 days from delivery of invoice for payment without interest charges.

All invoices must make reference to the PO number and this SO Master Agreement and shall be sent electronically to [accountspayable@cmhc-schl.gc.ca](mailto:accountspayable@cmhc-schl.gc.ca)

Before advancing any amount to the SO Holder, CMHC reserves the right to determine, in its sole and absolute discretion, whether the Services were performed in accordance with the Call-up and the terms and conditions of the SO Master Agreement. In the event that the Services do not meet the standards set out in the SO Master Agreement and/or a Call-up, CMHC may take such action as reasonably necessary to correct the SO Holder's default, including, without limitation, the following:

- a) Directing the SO Holder to redo the work that was not completed in accordance with the SO Master Agreement;
- b) Withholding payment;
- c) Setting off any expenses incurred by CMHC in remedying the default of SO Holder against payment for payment due to the SO Holder;
- d) Terminating the SO Master Agreement for default.

### **3.5.1 Method of Payment**

All payments due under the SO Master Agreement will be made by means of Electronic Funds Transfer (“EFT”). The SO Holder is responsible for providing CMHC with all the information set out in Section 3.5.2 to allow EFT to be effected and for keeping the information up to date. In the event that CMHC is unable to make payment by EFT, the SO Holder agrees to accept payment by cheque or another mutually agreeable method of payment.

### **3.5.2 Direct Deposit and Income Tax Reporting Requirement**

As a federal Crown Corporation, CMHC is obliged under the Income Tax Act and Regulations to report payments to contractors of goods and/or services by using a T1204 supplementary slip. CMHC must therefore obtain the necessary information from contractors, including the SO Holder’s social insurance number and/or corporate identification number, in order to allow CMHC to make payment by EFT and to complete the T1204 supplementary slip. The SO Holder is required to complete and sign a Supplier - Direct Deposit and Tax Information Form (CMHC/SCHL 3085) prior to commencement of the Term. Throughout the Term, the SO Holder is required to ensure that the information provided remains accurate and up to date. The SO Holder assumes full responsibility for any errors in payments or tax reporting that arise because the information supplied is inaccurate or out of date.

### **3.6 Audit**

The SO Holder shall maintain proper and standard records and accounts during the Term and for a period of three (3) years following the end of the Term. The SO Holder agrees to allow CMHC’s internal and external auditors the right to examine, at any reasonable time during normal business hours and upon reasonable notice to a maximum of twice per calendar year, any and all records relating to the services identified herein.

The SO Holder agrees to provide the CMHC’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 CMHC agrees to cooperate with the SO Holder in the course of conducting any audit in order to avoid disruption in day-to-day operations and to preserve confidentiality of any proprietary information that is disclosed.

## **Article 4.0 - GENERAL TERMS AND CONDITIONS**

### **4.1 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 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.
- 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.

#### **4.2 Confidentiality and Non-Disclosure of CMHC Information**

- a) "CMHC Information" refers to any and all information of a confidential nature that is transferred, directly or indirectly, to the SO Holder or for which access is provided to the SO Holder including all personal information, that is in the care or control of CMHC, and is managed, accessed, collected, used, disclosed, retained, received, created or disposed of in relation to the provision of the Services, whether or not it is marked as confidential. Without limiting the generality of the foregoing, CMHC Information includes data in any format, whether or not marked as confidential.
- b) The SO Holder understands the sensitive nature of the CMHC Information and agrees to treat all CMHC Information as proprietary, confidential and sensitive during the Term and following termination of the Agreement, unless otherwise specifically agreed to in writing by CMHC.
- c) The SO Holder further agrees to restrict access to CMHC Information to those persons who have a need to know this information in order to perform the Services and who are bound by an obligation of confidentiality that is as strict as that contained in this Agreement provided such persons meet the appropriate security screening as per Government of Canada security screening classification prior to CMHC granting any such access. Where the Services are sensitive in nature, CMHC may require that the SO Holder provide an Oath of Secrecy for each of its employees or persons engaged in performing the Services.
- d) In the event that the SO Holder experiences a breach of confidentiality with respect to the CMHC Information, the Contractor will immediately notify CMHC and co-operate with CMHC to the extent required to remedy the breach.
- e) The SO Holder further acknowledges and understands that CMHC considers all CMHC Information to be under its custody and control at all times, and that all information in the care and control of CMHC is subject to federal laws on privacy and access to information.

- f) The SO Holder shall, at all times, ensure to transmit information between the SO Holder and CMHC through secure means of transmission.
- g) In addition, when CMHC Information is stored, the SO Holder will, at all times, use reasonable administrative, physical and technological security measures to ensure that the information remains confidential where applicable, and that the information is not lost or otherwise accessed without authority, as further described in Schedule F - Privacy and Security Requirements attached hereto. The SO Holder will also implement information management and governance tools and controls, as further described in Schedule A - Services. The requirements of Schedule A – Services will be binding on any third party to whom the SO Holder outsources any of its IT or information management functions or who is managing such functions on behalf of the SO Holder. In addition to the requirements set forth in Schedule A - Services, the SO Holder shall, to the extent the information contains personal information, comply with applicable Canadian privacy laws.
- h) The SO Holder shall conduct regular security assessments to ensure safeguards are working effectively.
- i) The SO Holder shall ensure all CMHC Information is encrypted while in transit and at rest at a minimum 128 bit encryption throughout the Term.
- j) Any CMHC Information provided to the SO Holder in the performance of the Services shall be returned, uncopied to CMHC or destroyed by the SO Holder immediately following the termination of this Agreement or upon the request of CMHC. For documents not returned to CMHC, the SO Holder shall proceed to the destruction of such documents in accordance with CMHC's reasonable instructions and provide specific proof under oath of their destruction. Notwithstanding the foregoing, the SO Holder shall be permitted to maintain copies of such documentation, as it reasonably requires in accordance with records retention or other regulatory requirements, provided that such retained documentation shall at all times remain subject to the other provisions of this Agreement.
- k) The SO Holder shall ensure that CMHC Information shall remain in Canada and accessed from/ within Canada and by individuals who have obtained the appropriate security screening as per Government of Canada security screening classification and expressly agrees to logically segregate CMHC Information in electronic format and physically segregate physical documents.

SO Holder will not handle any CMHC Data outside Canada without the prior written approval of CMHC, which approval may be withheld by CMHC, in its sole discretion. Any approval granted pursuant to this Section 1(k) will relate only to the specific: (1) roles and the specific SO Holder's subcontractors (if applicable); (2) CMHC Data; and (3) geographical parameters, in each case in respect of which such approval was granted. Schedule F identifies those approved locations that will potentially have access to CMHC Data throughout the Term, as well as, the conditions under which such access shall be granted to such approved locations.

Section 1 (k) For the purposes of this Agreement, the facilities set out in Schedule F will be deemed the approved locations for the

performance of the applicable Services set out in this Agreement or in any Service Order connected to this Agreement for the Term of the Agreement. No other off-shore facility or location shall perform Services or handle CMHC Data unless SO Holder has obtained CMHC's prior written approval and such location is added as a newly approved location via a duly executed amendment between the Parties.

- l) Without limiting the generality of the foregoing, the SO Holder shall ensure that any subcontractor, reseller, agent or any other entity engaged to perform any portion of the Services does not release, share or otherwise divulge CMHC Information to any other entity including subsidiaries, branch offices, partners of the SO Holder or subcontractors without the prior written consent of CMHC.
- m) The SO Holder may disclose CMHC Information where required to do so pursuant to a lawful requirement or for the purposes of complying with a subpoena, warrant or other legal compulsion lawfully made by a court or other competent authority. When the SO Holder discovers that it may potentially be required to disclose CMHC Information for the reasons described in the immediately foregoing sentence, the Contract shall: (a) notify CMHC promptly so that CMHC has the opportunity to seek a protective order or other appropriate remedy; (b) provide information and other assistance in order for CMHC to take appropriate legal action against disclosure; and (c) ensure that disclosure is strictly limited to the information lawfully requested.
- n) Employees of the SO Holder may be required to undergo a criminal records check or hold a valid personnel security screening at the level of Enhanced Reliability prior to commencement of any Services and must provide the results of the check to CMHC's corporate security department. CMHC reserves the right to disallow any person to carry out work under the Agreement on the basis of the results of the criminal records check/security clearance. Each of the SO Holder's proposed staff, who do not hold a valid clearance, will be required to complete a "Security Clearance Form" (67934) upon request from CMHC.

#### **4.3 SO Holder's Indemnification**

Except to the extent permitted by law, the SO Holder agrees to indemnify, defend and hold harmless CMHC, its officers, employees and agents, for all loss, damages, costs, expenses, claims, demands, actions, suits or other proceedings of every nature and kind, including legal fees, arising from or in consequence of an act or omission of the SO Holder related to the performance of the Services. To the extent that CMHC's actions contribute to the loss or damages, CMHC shall be responsible for its proportionate share of the liability. The indemnification applies whether the actions, suits or proceedings are brought in the name of CMHC or in the name of the SO Holder. The SO Holder shall be fully responsible to CMHC for the acts and omissions (including negligence) of its subcontractors and of persons directly or indirectly engaged by such subcontractors as if such acts and omissions were those of the SO Holder.

CMHC shall have the right to assume control of its own defence at any time, provided that it assumes the costs of its defence.

#### **4.4 Independent SO Holder**

It is understood by the Parties that the SO Holder shall act as an independent contractor for the purposes of the SO Master Agreement. It and its employees, officers, agents and contractors are not engaged as employees of CMHC. The SO Holder agrees to so advise its employees, officers, agents and contractors.

Without limiting the generality of the foregoing, the SO Holder shall retain complete control of and accountability for its employees, agents and contractors. The SO Holder shall prepare and process the payroll for its employees directly and shall withhold and/or pay all applicable employment taxes and statutory payroll deductions required in respect of its employees. All personnel employed by the SO Holder at the beginning of the Term shall, at all times, and for all purposes, remain solely in the employment of the SO Holder.

#### **4.5 SO Holder's Authority**

The SO 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.

#### **4.6 Corporation Identification**

It is agreed that the SO Holder will make no use whatsoever of CMHC's name, logo or other official marks without the express written consent of CMHC.

#### **4.7 Conflict of Interest**

The SO Holder and its principals, employees, agents and subcontractors shall avoid any real, potential or apparent conflict of interest during the Term and shall declare any real, potential or apparent conflict of interest to CMHC immediately upon becoming aware of the conflict. The SO Holder shall, upon direction of CMHC, take steps to eliminate any conflict, potential conflict or perception that a conflict of interest exists.

The SO Holder must not provide any services to any third party in circumstances that might reasonably give rise to a conflict of interest between the SO Holder's duties to that third party and the SO Holder's duties to CMHC.

In the event that a conflict of interest, real, potential or perceived, cannot be resolved to the satisfaction of CMHC, CMHC shall have the right to immediately terminate the SO Master Agreement. All work product that has been completed at the date of termination 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 SO Master Agreement. Upon such payment, CMHC shall have no further obligation of any nature or kind to the SO Holder.

Any public office holder or former public office holder must be in compliance with the provisions of the *Conflict of Interest Act* in order to derive a direct benefit from any SO Master Agreement.

## **4.8 Insurance Requirements**

The SO Holder shall procure, supply and maintain, at its own expense, the designated insurance, or cause to be procured and maintained such insurance in force for the duration of this Master Agreement. On the Effective Date, all insurance coverage(s) of SO Holder shall be issued by financially sound and responsible regulated insurance companies and shall have an A.M. Best Company, Inc. rating of "A-" or better (or such other debt rating agencies and/or rating as approved at the sole discretion of Canada Mortgage and Housing Corporation)

### **4.8.1 Commercial General Liability Insurance:**

The SO Holder shall provide, maintain and pay for Commercial General Liability insurance with an insurer licensed to do business in Canada with a limit of not less than \$5,000,000 inclusive for personal injury, bodily injury (including death) and property damage for any one occurrence or series of occurrences arising from one cause. The policy shall provide coverage for, but not be limited to, all premises and operations of the SO Holder, liability for products and completed operations, broad form coverage, SO Holder's liability, non-owned automobile, employer's liability, contractual liability and liability specifically assumed under this Agreement. Canada Mortgage and Housing Corporation shall be added to the policy as an additional insured and the policy shall contain cross liability, and severability of interest clauses.

### **4.8.2 Professional (Errors & Omissions) Liability:**

Professional Errors & Omissions Liability insurance with an insurer licensed to do business in Canada with a limit of not less than \$2,000,000 per claim, providing coverage for, but not limited to, economic loss due to actual or alleged acts, errors or omissions or wrongful acts committed by the SO Holder, its agents or employees in the performance of services. The SO Holder shall ensure that the policy is renewed continuously for a minimum period of three (3) years following the expiration or early termination of this Agreement.

### **4.8.3 Cyber Liability:**

Computer Security and Privacy Liability with an insurer licensed to do business in Canada with a limit of not less than \$2,000,000 per claim and aggregate, covering actual or alleged acts, errors or omissions committed by the SO Holder, its agents or employees. The policy shall also extend to include the intentional, fraudulent or criminal acts of the SO Holder, its agents or employees. The policy shall expressly provide, but not be limited to, coverage for the following perils:

- i. unauthorized use/access of a computer system
- ii. Defense of any regulatory action involving a breach of privacy or transmission of malicious code
- iii. Failure to protect confidential information (personal and commercial information) from disclosure
- iv. Notification costs, whether or not required by statute.

The policy shall be renewed continuously for a minimum period of three (3) years following expiration or early termination of this Agreement.

The SO Holder shall be responsible for all claims expenses and loss payments within the policy deductible or self-insurance retention. If the policy is subject to an aggregate limit, replacement insurance will be required if it is likely such aggregate will be exceeded. Such insurance shall be subject to the terms and conditions and exclusions that are usual and customary for this type of insurance.

If this insurance is provided on a claims-made basis, the SO Holder shall maintain continuous insurance coverage during the term of this Contract and in addition to the coverage requirements above, such policy shall provide that:

1. Policy retroactive date coincides with or precedes the insureds' initial services under the Agreement and shall continue until the termination of the Agreement (including subsequent policies purchased as renewals or replacements);
2. Policy allows for reporting of circumstances or incidents that might give rise to future claims; and not less than a three year extended reporting period with respect to events which occurred but were not reported during the term of the policy or ongoing coverage is maintained.

#### **4.8.4 Other Conditions**

If there are material changes in the scope of Services provided under this Agreement, CMHC may request changes to the minimum insurance coverages set out above. All required insurance policies shall be with insurers licensed to underwrite insurance in the jurisdiction of the *Place of the Work*. All insurance policies required to be maintained by SO Holder pursuant to this insurance clause shall be primary with respect to this Agreement and any valid and collectible insurance of CMHC shall be excess of SO Holder's insurance and shall not contribute to it. All Certificate of Insurance shall mention that insurers will provide CMHC with at least thirty (30) days' written notice prior to cancellation of any insurance referred to under this insurance clause. In addition SO Holder shall provide written notice to CMHC forthwith upon learning that an insurer described in this insurance clause intends to cancel, or intends to make or has made a material change to, any insurance referred to in this insurance clause. A Certificate of Insurance meeting the above requirements shall be delivered to CMHC upon execution of this Agreement and for each renewal thereafter.

Without in any way restricting CMHC's discretion to grant or withhold its consent to a request to subcontract pursuant to this Agreement or any other contract, the SO Holder agrees that it shall contractually obligate any sub-contractor or independent contractor retained in connection with this Agreement and any other contract to maintain insurance against such risks and in such amounts that having regard to such sub-contractor or independent contractor's involvement in the provision of the Services could reasonably be expected to be carried by persons acting prudently and in a similar business to that of such sub-contractor or independent contractor. It shall be the sole responsibility of the SO 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 fulfill its obligation under the contract.

#### **4.9 No Limitations**

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

#### **4.10 Non-Compliance**

If the SO Holder fails to comply with a direction or decision of CMHC properly given under the terms of the SO Master Agreement, CMHC may take such actions and incur such costs that are reasonably required to implement its direction including, without limitation, the engagement of another contractor and withholding of payment due to the SO Holder for Services rendered, which moneys may be set off by CMHC against any expenses that it may incur in remedying a default or failures as described above.

#### **4.11 Force Majeure**

In the event that a Party is prevented from fulfilling its obligations under the terms of the SO Master Agreement by a force majeure or act of God (an event or effect that cannot be reasonably anticipated or controlled), the impacted Party shall notify the other Party in writing as soon as reasonably possible. The written notice shall be sent by registered mail and shall outline the circumstances that constitute a force majeure or an act of God, which may include, but are not limited to, war, serious public disturbances, impediments arising from orders or prohibitions of public authority, actions of public enemies, strikes, lockouts and other labour disputes, riots, flooding, hurricane, fire, explosion or any other natural disasters over which the Party has no reasonable control.

Where CMHC concludes, in its sole discretion, that the SO Holder will not be able to fulfill its obligations under the SO Master Agreement, CMHC may secure the services of other qualified SO Holders to perform the Services without further compensation or obligation to the SO Holder.

#### **4.12 Non-Waiver**

Failure by either party to assert any of its rights under the SO Master Agreement shall not be construed as a waiver thereof.

#### **4.13 Laws Governing SO Master Agreement**

This SO Master Agreement shall be governed by and construed in accordance with the laws of the Province of Ontario and the laws of Canada as applicable. The parties attorn to the jurisdiction of the Federal Court or the courts of the Province of Ontario as appropriate in the circumstances.

The SO Holder shall give all notices and obtain all licenses, permits and authorizations required to perform the Services. Both parties shall comply with all the laws applicable to the services or the performance of the SO Master Agreement.

#### **4.14 Official Languages**

The SO Holder acknowledges and understands that CMHC is governed by the *Official Languages Act* and follows related Treasury Board Policies. The SO Holder agrees to take any measures necessary to ensure compliance with the *Act* and those policies. When providing services to or communicating with CMHC employees, in person, over the phone or in writing (including electronic correspondence), the SO Holder must actively offer

bilingual services in and indicate clearly by verbal and/or visual means that employees can communicate with and obtain available services in either English or French. The SO Holder must also ensure that there is sufficient capacity to provide services that are comparable in terms of quality and timeliness in both official languages.

#### **4.15 Access to CMHC Property and Security Clearance**

The SO Master Agreement does not provide automatic access to CMHC premises. Where specified in the SO Master Agreement and/or a Call-up CMHC agrees to permit access by the SO Holder's employees onto CMHC premises for the purpose of fulfilling its obligations as per the terms of this SO Master Agreement. However, CMHC reserves the right to refuse entry of SO Holder's personnel for operational reasons. CMHC also will have the right at any time to remove from and/or refuse entry to its premises any incompetent or intemperate employee, or any employee who violates CMHC safety and/or security regulations or interferes with CMHC operations at the site.

Employees of the SO Holder and, if applicable, subcontractors may be required to undergo a criminal records check and/or hold a valid personnel security screening at the level of **RELIABILITY** prior to commencement of any work performed under the SO Master Agreement and must provide the results of the check to CMHC's corporate security department. Additionally, at least one team member of selected respondent for each Call-up should be security cleared with **SECRET** clearance. CMHC reserves the right to disallow any person to carry out work under the SO Master Agreement on the basis of the results of the criminal records check/security clearance. Each of the respondent's proposed staff, who do not hold a valid clearance, will be required to complete a "Security Clearance Form" (67934) upon request from CMHC.

If employees of the SO Holder are not security cleared, they will require an escort by a CMHC employee when onsite CMHC premises and will not be granted access to CMHC information and systems or any confidential information.

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

CMHC may, at any time and from time to time, order a suspension of the Services 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 SO Holder. If any such suspension, modification, change or addition results in an increase or decrease in the cost of the Services, the amount in Section 3.1 shall be adjusted accordingly, provided that the SO 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.

#### **4.17 Extras**

Except as otherwise provided in the SO Master Agreement, no payment for extras shall be made unless such extras and the price thereof have been authorized in writing by CMHC.

#### **4.18 Assignment of the SO Master Agreement**

The SO Master Agreement shall not be assigned in whole or in part by the SO Holder without the prior written consent of CMHC, which may be withheld for any reason, except that the SO Holder shall be permitted without CMHC's consent, to transfer any outstanding

receivables under this SO Master Agreement to any affiliate of the SO Holder or any reputable Canadian financial institution.

It is understood and agreed that the SO Holder may engage other entities to assist with the SO Holder in providing of the Services, provided that the SO Holder shall at all times retain full responsibility for the provision and quality of the Services and acts in a manner which fully recognizes and respects the confidential nature of the Services. No purported assignment of the SO Master Agreement shall relieve the SO Holder from any obligation under the SO Master Agreement or impose any liability upon CMHC.

#### **4.19 Key Persons and Assigns**

If specific individuals are identified in the SO Master Agreement and/or a Call-up to perform the Services or any part thereof, the SO Holder shall provide the Services of those individuals unless the SO Holder is unable to do so for reasons beyond its reasonable control.

If the SO Holder is unable to provide the Services of any specific individual identified in the SO Master Agreement and/or a Call-up, it shall, as soon as possible, give notice to CMHC of the reason rendering it is unable to do so and submit the name, qualifications and experience of a proposed replacement for CMHC's review and approval.

The SO Holder shall not, in any event, allow performance of the Services by unauthorized replacement persons. CMHC may order that any individual identified in the SO Master Agreement and/or a Call-up to perform the Services or any part thereof or, if applicable, a replacement, stop performing the Services. In such a case, the SO Holder shall immediately comply with the order and submit the name, qualifications and experience of a proposed replacement for CMHC's review and approval. The fact that CMHC does not order that any individual stop performing the Services does not relieve the SO Holder from its responsibility to meet the requirements of the SO Master Agreement.

#### **4.20 Closure of CMHC Offices or Suspension of Operations**

Where CMHC premises become inaccessible due to evacuation or closure because of events or circumstances beyond the control of CMHC, where the health or safety of persons on the premises may be reasonably determined by CMHC, in its sole judgment, to be at risk, or where CMHC operations are suspended, payment to the SO Holder may be suspended or modified. Where the SO Holder provides satisfactory evidence to CMHC that the SO Holder will continue to incur monetary obligations to others directly as a result of its undertakings under this SO Master Agreement and is unable to mitigate its losses due to such obligations, CMHC may continue payment in full, or at a reduced amount, or suspend payment completely.

#### **4.21 Severability**

If any part of the SO Master Agreement is determined to be unenforceable by a competent authority, it may be severed from the SO Master Agreement so as to preserve the intentions of the Parties to the extent possible.

#### **4.22 Scope of SO Master Agreement**

This SO Master Agreement contains all of the SO Master Agreements of the Parties and no other representations or warranties, verbal or otherwise, exist between the Parties except

those set out herein or attached as Specifications, Conditions and Addendum and signed by both Parties. In case of conflicts between the SO Holder's documents and CMHC's documents, the latter shall govern.

#### **4.23 Binding**

This SO Master Agreement shall be binding upon the Parties, their heirs, executors, administrators, successors and assigns.

No amendment, supplement, restatement or termination of any provision of this SO Master Agreement is binding unless it is in writing and signed by both Parties to this SO Master Agreement at the time of the amendment, supplement, restatement or termination.

#### **4.24 Privacy**

**4.24.1** SO Holder acknowledges and agrees that all Personal Information collected or accessible to SO Holder in the course of providing the Services, including CMHC Personal Information constitutes Confidential Information of CMHC to which the provisions of Section 4.2 apply, except to the extent such provisions are inconsistent with this Section 4.24, which prevails with respect to CMHC Personal Information. In addition to the foregoing obligations, SO Holder will:

- a) Handle all CMHC Personal Information in accordance with Canadian privacy laws;
- b) Subject to Section 4.24 (a), perform its obligations under this Agreement in a manner that will facilitate CMHC's compliance with Canadian privacy laws;
- c) If requested by CMHC, within five Business Days from the date upon which the request was made by CMHC, to the extent SO Holder has possession or control of CMHC Personal Information, either: (i) update, correct or delete CMHC Personal Information or modify the individual's choices with respect to the permitted use by CMHC of such CMHC Personal Information; or (ii) provide access to CMHC or to its other service providers to enable it to perform the activities described in clause (i) itself;
- d) If SO Holder receives a request for access to CMHC Personal Information that is under the possession or control of SO Holder immediately refer such request to CMHC, and respond to any such request only by making reference to such referral; and, if CMHC is required by any Canadian privacy laws to provide CMHC Personal Information to an individual that is in SO Holder's possession or control, at CMHC's request, provide such CMHC Personal Information to CMHC on or before the deadlines for such provision required to enable CMHC to comply with any deadlines applicable under such Canadian privacy laws to the provision of such CMHC Personal Information, provided that CMHC has given SO Holder sufficient notice to meet such deadlines;
- e) If not legally prohibited (or has received a request from a law enforcement official to refrain) from doing so, notify CMHC of any subpoena, warrant, order, demand, requirement or request (including any national security letter) made by a governmental or regulatory authority for the disclosure of CMHC Personal Information, and, to the maximum extent permitted by applicable law, reasonably cooperate with CMHC in its efforts to oppose, seek judicial relief of and appeal any such subpoena, warrant, order,

demand, requirement or request;

- f) Immediately notify CMHC if SO Holder receives notice from any governmental or regulatory authority alleging that CMHC or SO Holder has failed to comply with Canadian privacy laws in connection with the performance of this Agreement, or if SO Holder otherwise becomes aware and reasonably believes that SO Holder or CMHC may have failed or may in the future fail to comply with Canadian privacy laws in connection with the performance of this Agreement;
- g) At CMHC's direction, cooperate and comply with any requests or instructions issued by any privacy or data protection authority, including any governmental or regulatory authority applicable to CMHC or CMHC Personal Information;
- h) Provide reasonable assistance to CMHC in responding to and addressing any complaint relating to the handling of CMHC Personal Information in the course of the performance of the Services; and
- i) Upon CMHC's written request, provide CMHC with an updated list of all SO Holder personnel that have handled CMHC Personal Information.
- j) Shall obtain or cause to be obtained all necessary consents from participants providing data or personal information for purposes of disclosure and use by CMHC, and such consents shall be in a manner and form approved by CMHC.

#### **4.24.2 Privacy Breach Notification**

Upon becoming aware of the occurrence of any security breach or privacy breach, SO Holder will do the following, subject to applicable law.

- a) Immediately, but in any event not later than two (2) business days from the date SO Holder becomes aware of the occurrence of such security breach or privacy breach, notify CMHC by telephone and in writing;
- b) Take all steps necessary to enforce against any person that is or may be engaging in such unauthorized handling any rights that SO Holder has to require such Person to comply with any obligation of confidence to SO Holder and to cease such unauthorized activities;
- c) Do all things, execute all documents and give all assistance reasonably required by CMHC to enable CMHC to enforce against any person that is or may be engaging in such unauthorized handling any rights that CMHC has to require such person to comply with any obligation of confidence to CMHC and to cease such unauthorized activities; and
- d) If the security breach involves CMHC Personal Information, then, if requested by CMHC, reasonably cooperate with and assist CMHC in CMHC's communication with the media, any affected Persons (by press release, telephone, letter, call centre, website or any other method of communication) and any governmental or regulatory authorities to explain the occurrence of the security breach and the remedial efforts being undertaken. The content and method of any such communications will be determined by CMHC and SO Holder, to the extent such content refers to SO Holder,

acting reasonably. Additionally, SO Holder shall assist CMHC in mitigating any potential damage and take such commercial steps as are directed by CMHC to assist in the investigation, mitigation and remediation of each such security breach. As soon as reasonably practicable after any such security breach, SO Holder shall conduct a root cause analysis and, upon request, will share the results of its analysis and its remediation plan with CMHC. SO Holder shall provide updated information to CMHC should additional details be discovered regarding the cause, nature, consequences, or extent of the security breach.

#### 4.24.3 Access to Information

- a) SO Holder acknowledges that the Access to Information Act applies to CMHC and may require the disclosure of information. The Parties will comply with the provisions of the Access to Information Act, including in connection with a request under the Access to Information Act by a third party for access to information (“**Access to Information Act Request**”).
- b) If an Access to Information Act Request is made to SO Holder (rather than to CMHC) for access to any CMHC Information, SO Holder will: (a) not communicate with or respond to the Person making the Access to Information Act Request, except as directed by CMHC in writing; (b) promptly, but in any event within seven days (or such other period of time as may be agreed by the Parties) of the receipt of such Access to Information Act Request, forward that Access to Information Act Request to CMHC; and (c) without detracting from CMHC’s responsibilities and SO Holder’s rights under the Access to Information Act, reasonably cooperate with CMHC as necessary to enable CMHC to respond to each Access to Information Act Request or otherwise comply with the Access to Information Act.

#### 4.25 Research Standards

Where research involves human participants, the SO Holder agrees to conduct the research respecting the core principles of the [Tri-Council Policy Statement: Ethical Conduct for Research Involving Humans](#) – respect for persons, concern for welfare, and justice. The SO Holder agrees to the following terms for research involving human participants:

- (1) Shall obtain or cause to be obtained consents from all human participants in the research in accordance with the general principles of informed consent by the [Tri-Council Policy Statement: Chapter 3 - The Consent Process](#);
- (2) Shall submit to CMHC, prior to any research activities being undertaken, all research and ethics protocols including, but not limited to: (1) description of recruitment approach and copies of all recruitment materials (scripts and invitation to participate); (2) a description of all data collection methods and copies of all research instruments (such as interview and/or focus group questions and survey questionnaires); and, (3) description of the method for obtaining informed consent including a copy of the consent form , all of which shall be in a manner and form to be approved by CMHC. CMHC reserves the right, in its sole discretion, to require additional documents;

- (3) Ensure all researchers involved in the project are informed of their obligations under the Tri-Council Policy Statement: Ethical Conduct for Research Involving Humans and have completed, as a minimum, the [TCPS 2: CORE training](#). CMHC reserves the right to require the SO Holder to provide completion certificates of the [TCPS 2: CORE training](#), as well, CMHC reserves the right, where applicable and in its sole discretion, to direct the SO Holder to complete other training(s) prior to research activities being undertaken;
- (4) Where the research involves human participants that are from populations experiencing vulnerabilities, as defined by CMHC pursuant to the National Housing Strategy, the SO Holder shall:
  - a) Prior to research activities being undertaken, require and obtain approval from a research ethics board (“REB”) and ensure that such approval from the REB is maintained as long as the research activities involving populations are carried out. The REB may be an academic or community research ethics board in Canada that is qualified to enable review and approval of the research;
  - b) Provide to CMHC for review, a copy of the statement of ethics approval from the qualified REB within seven (7) days of obtaining REB approval and prior to any research activities being undertaken;
- (5) Upon becoming aware of the occurrence of any breach of the [Tri-Council Policy Statement: Ethical Conduct for Research Involving Humans](#), the SO Holder will immediately notify CMHC no later than two (2) business days from the date the SO Holder becomes aware of the breach, and the SO Holder shall undertake all necessary actions to mitigate the breach. The SO Holder agrees to reasonably cooperate with CMHC and any governmental or regulatory authorities to explain the occurrence of the breach and the remedial efforts being undertaken.

#### **4.26 Photographs**

- a) All images must be included on the Image Copyright Information Form that is to be submitted with the report. Graphs and charts (and associated data) should be sent in an Excel document. Illustrations should be sent as vector files. All images must also be provided as TIFFs, JPEGs, or EPSs with a minimum resolution of 3000dpi. Higher resolution images are required for high quality products and intricate images. A digital scan of a lower resolution image is not acceptable except as provided to document the location of the graphic in the text.

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.

#### **4.27 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; One copy of all material of which CMHC has ownership and publication rights in the form in which it was used by the author; and,
  - (ii) When a report is required in both official languages, the Standing Offer Holder is responsible for translating the report.
- 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

## **Article 5.0 - SO MASTER AGREEMENT ADMINISTRATION**

### **5.1 Contract Administrator**

Each Party shall assign a contract administrator that will be responsible for overseeing the SO Master Agreement. The individuals named in Section 5.2 are the initial SO Master Agreement administrators.

The Parties shall notify the other in writing in the event that the contract administrator is changed. CMHC will notify the SO Holder in writing of the names of any CMHC representatives who are authorized to assign jobs and approve payments with respect to the work carried out under this SO Master Agreement.

### **5.2 Notices**

All notices issued under the SO Master Agreement shall be in writing and shall be forwarded via mail, courier or e-mail:

To CMHC at the following address:

**Canada Mortgage and Housing Corporation**

Name: identified at SO award

Title:

Phone:

Email: [@cmhc-schl.gc.ca](mailto:@cmhc-schl.gc.ca)

To the SO Holder at the following address:

**LEGAL NAME of SO HOLDER**

Name: identified at SO award

Title:

Phone:

E-mail:

## **Article 6.0 - DOCUMENTS COMPRISING THE SO MASTER AGREEMENT**

- 6.1** The documents which comprise the entire SO Master Agreement between the Parties with respect to this matter consist of the following:
- a. This form of SO Master Agreement as executed PA #\_\_\_\_;
  - b. CMHC's Call-up as executed and applicable PO #\_\_\_\_; and
  - c. SO Holder's response to RFSO-000462.

Together with all written change notices issued by CMHC hereunder and such further specifications and documents as the parties may agree in writing.

- 6.2** The documents comprising the SO Master Agreement are complementary and what is called for in any one shall be binding as if called for by all. The SO Master Agreement documents shall be interpreted as a whole and the intent of the whole shall govern. In the event of a conflict between them, the SO Master Agreement documents shall have precedence among themselves in the order as listed above.

[Signatures on the following page]

**IN WITNESS WHEREOF** this SO Master Agreement has been executed by duly authorized officers of the Parties as follows:

**SO HOLDER**

**CANADA MORTGAGE AND HOUSING CORPORATION**

\_\_\_\_\_  
Name:

\_\_\_\_\_  
Identified at SO award

\_\_\_\_\_  
Title:

\_\_\_\_\_  
Title:

\_\_\_\_\_  
Date:

\_\_\_\_\_  
Date:

## **SCHEDULE A – SERVICES**

- To be completed based on the qualified stream(s) and to be agreed to with the selected SO Holder.

### **Call-up Process**

Call-ups will be made by CMHC under the SO Master Agreement and must be for Deliverables included in the SO Master Agreement at the prices and in accordance with the terms and conditions specified in the SO Master Agreement. CMHC does not guarantee that any selected SO Holder will be awarded a Call-up. Call-up(s) may be issued on an as-and-when required basis as per the process outlined below.

#### **1. Direct Call-up(s)**

CMHC may issue a direct Call-up to any SO Holder up to CAD\$100,000.00 total contract value (service fees including all applicable taxes and travel expenses). The SO Holder must not perform any work or services in response to Call-Ups which would cause the total cost to CMHC to exceed the said sum, unless an increase is pre-authorized by CMCH...

Alternatively, CMHC may invite two (2) or more SO Holders to provide a proposal for individual requirement prior to issuing a direct Call-up.

#### **2. Rotational basis**

- a. For any contract values of an individual requirement between CAD\$100,001.00 and CAD\$400,000.00 two (2) SO Holders, at a minimum, qualified in the applicable stream, are to be invited to provide a proposal for the individual requirement.
- b. For any contract values of an individual requirement exceeding CAD\$400,000.00 all SO Holders qualified in the applicable stream are to be invited to provide a proposal for the individual requirement

The SO Holder must not perform any work or services in response to Call-ups which would cause the total cost to CMHC to exceed the said sum, unless an increase is pre-authorized by CMHC.

## **SCHEDULE B – RATES**

- To be completed based on the qualified categories and to be agreed to with the selected SO Holder.

## SCHEDULE C – CMHC TRAVEL POLICY

**Note:** Listed amounts are an example and are adjusted quarterly based on the Government of Canada Treasury Board Travel Policy.

- Air** – most economical airfare available must be selected at the time of reservation. Business class permitted for international travel 9 hours or more continuous flying time.
- Car and Hotel** – Some suppliers have agreed to extend their government rates to contractors, consultants or advisors working under contract to CMHC and traveling on official CMHC business in performance of that contract. CMHC will provide contractors, consultants or advisors with a letter, specifying the duration of their contract or specifying that they are on travel status on behalf of CMHC and their destination. Government rates for car rentals and hotel accommodations can be found on the following website - <http://rehelv-acrd.tpsgc-pwgsc.gc.ca/ACRDS/index-eng.aspx>. If not selecting a supplier from the list on that website, travellers must choose alternate suppliers with rates similar to those published government rates.
- Meal and Incidental Allowance** - A traveller shall be paid the applicable meal allowance, as described below, for each breakfast, lunch and dinner while on travel status. A meal allowance shall not be paid to a traveller with respect to a meal that has been provided or is claimed as a hospitality expense. A traveller shall be paid an incidental expense allowance that covers a number of miscellaneous expenses not otherwise provided for in this directive for each day or part day in travel status as per information posted below. Incidentals may be claimed by a traveller only when there is at least one overnight stay involved in travel.

Meal Allowance for Canada and USA (effective April 1 <sup>st</sup> , 2021)				
Private non-commercial accommodation allowance	Breakfast	Lunch	Dinner	Daily Totals – Meals
\$50.00	\$21.10	\$21.35	\$52.40	\$94.85

- Privately-owned vehicle and applicable Kilometre Rates** - The traveller shall be reimbursed the lesser of the CMHC's rates or the cost (net of taxes) of the mileage to the SO Holder. The CMHC's kilometric rates payable for the use of privately owned vehicles driven on authorized corporate business, effective April 1, 2021, 55.50¢/km for vehicles registered in Ontario and 53.0¢/km for vehicles registered in Quebec (rates include tax). The traveller shall use the most direct, safe and practical road routes and shall claim only for distances necessarily driven on business travel.

Traveller may use a privately owned vehicle for business purposes when its use is economical and practical as compared to renting a vehicle, commercial travel by airline carrier, train, taxi, etc. The following requirements must be adhered to when using a privately owned motor vehicle while travelling on Corporation business:

Any person (employee, contract employee, consultant) using a private vehicle on Corporation business, must ensure that the vehicle is protected by a minimum \$1,000,000 Public Liability and Property Damage Insurance. When use of a private vehicle is required for an individual to perform his or her job functions, CMHC will pay the additional premium cost, if any, for Supplementary Business Insurance coverage, if required by the individual's insurer.

**SCHEDULE D – TRAVEL ESTIMATE FORM**

**TRAVEL ESTIMATES FORM  
FOR SO HOLDERS**

SO HOLDER INFORMATION		
Company Name		Number of travellers
CMHC Contracting Authority	Division	RC
TRAVEL INFORMATION		
Region of travel	Contract Start Date	Contract End Date
Purpose of Trip / Objective		
Explain why virtual presence or other remote meeting solutions were not used.		
Provide rationale for the mode of transportation selected.		
TOTAL ESTIMATED COST BEFORE TAXES		
		\$ CAD
Transportation Type (Air, Rail or Car)		
Accommodation		
Meals		
Miscellaneous (Detail required)		
<b>Total</b>		

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Approved by: (CMHC financial authority signature)

## SCHEDULE E - PRIVACY AND SECURITY REQUIREMENTS

**“Authorized Person”** means officers, employees and contractors of SO Holder who have a need to know to the Information.

**“Data Custodian”** means SO Holder or SO Holder subcontractor who is granted access to CMHC Information and assumes the responsibilities set out in **Exhibit 1 to SCHEDULE E – Responsibilities of the Data Custodian** of this Agreement

**“Identified Person”** means an Authorized Person whose current work-related responsibilities require access to the CMHC Information.

**“Logical Access Controls”** means the process of enforcing proper identification, authentication and accountability with respect to access to a computer system, based on the latest information technology (IT) security guidance. These include:

- individual user accounts;
- complex passwords eight (8) characters minimum, lower and upper case, numbers, special characters);
- access-based on role (privileged vs. non-privileged); and
- Auditing.

**“Portable Storage Devices (PSDs)”** means devices that are portable and contain storage or memory into which users can store information, including, but not limited to, laptops, CD-ROMs, flash memory sticks, backup media and removable hard disks.

**“Protected B”** means a security level assigned to information or assets that, if compromised, could cause serious injury to an individual, organization or government.

**“System”** means a single IT-related device, a component of such a device or a group of IT-related devices that may be used to receive, store, process or transmit information. This includes, but is not limited to, personal computers, servers, laptops, tablets, smart phones, virtual computers and cloud based virtual systems.

**“Visitor”** means an individual, other than an Authorized Person, who has been invited into the secure area by an Authorized Person, as permitted by SO Holder’s access policies.

### **“Privacy and Security Requirements”**

The Parties are required to protect the CMHC Information in accordance with applicable direction and guidelines from the Treasury Board of Canada (“TBS”), or their equivalent in the case of SO Holder, with respect to the protection of “Protected B” data, including guidance from CSE (ITSG-33) which aligns with the ISO 27001 framework. Further as a federal government institution, SO Holder acknowledges that CMHC is subject to the *Access to Information Act* (Canada) and the *Privacy Act* (Canada) and therefore SO Holder agrees to submit to whatever measures are necessary in order to ensure that CMHC can comply with these laws and their related regulations, policies, and directives (“ATIP Legislation”).

As such, SO Holder agrees: (i) to protect any personal information that it may access from CMHC Information provided through this Agreement in a manner that is compatible with provisions of ATIP Legislation; and (ii) will ensure that it has in place appropriate privacy protection measures to safeguard all CMHC Information that it has access to under this Agreement. More specifically, SO

Holder shall, as required by the provisions of this Agreement, comply with the security requirements described below at all times:

### **Physical Access:**

1. CMHC Information will be accessed within a secure location that allows unescorted access only to Authorized Persons. All Visitors to the secure location will be escorted by an Authorized Person at all times. The secure location can be within a series of buildings, one entire building, an entire floor within a building, or a single room. Once the perimeter of the secure location is defined, these requirements apply to all areas within the perimeter. Where a series of buildings is involved, a secure perimeter will be defined for each building. CMHC may approve other secure environments that provide a similar level of protection to CMHC Information.
2. Access to CMHC Information is limited to Identified Persons. The duties of the Data Custodian, as stated in **Exhibit 1 to SCHEDULE E - Responsibilities of the Data Custodian**, include maintaining an auditable trail on access to CMHC Information by Identified Persons. Under no circumstances may Visitors be permitted to access CMHC Information.

### **IT Storage and Transmission:**

3. The SO Holder shall ensure that CMHC Information remain in Canada and expressly agrees to logically segregate CMHC Information that is in electronic form and physically segregate CMHC Information in physical form. All Systems with access to CMHC Information will employ Logical Access Controls at the device and network level and will have functional and current antivirus software.
4. Where CMHC Information is held on PSDs, complex passwords with encryption will be used. The encryption level will meet the latest communications security establishment standards for Protected B" information which aligns with the ISO 27001 framework. This applies equally to backups of CMHC Information stored on PSDs.
5. Servers storing and transmitting unencrypted data, where used, will be located in a secure, controlled-access area, preferably in the same area where CMHC Information is accessed. If located in a separate area, controls will be in place to ensure that only Identified Persons can access the server. Unless CMHC Information is encrypted continuously while outside the secure area, a conduit will be used for all cabling and all cross-connect areas will be physically secured.
6. Network firewall rules will be in place such that no System processing CMHC Information can communicate at the network layer with any system that can be accessed by non-Identified Persons.

Network firewall rules will also be in place such that no System processing CMHC Information can be accessed at the network layer by a System outside of the secure area. CMHC Information may be stored on and transmitted over networks not meeting these requirements, provided that it is encrypted, except when at rest and in use by an Identified Person. Alternatively, CMHC Information may be stored on a stand-alone computer in a secure area with no external connections, or on a closed network within the secure area. When the network transmits information that leaves a secure area (for example, when a series of buildings house employees within a single organization), the CMHC Information will be encrypted whenever it is outside the secure area.

**Physical Storage:**

7. When not in use, PSDs containing CMHC Information will be stored in secure containers. This applies equally to backups of CMHC Information.
8. CMHC Information will not be removed from the secure area (as described in point 1 above) in any format (e.g., printouts, PSDs, etc.), and in accordance with this **Schedule E – Privacy and Security Requirements**. When not in use, printed documents containing CMHC Information will always be stored in secure containers.

**Information Copying and Retention & Record Management:**

9. Copies and extracts of CMHC Information may only be made for the purposes of carrying out the permitted purposes as covered by this Agreement. When no longer needed, any such copies or extracts will be destroyed in a secure manner as required under this Agreement (as applicable).
10. Paper documents containing CMHC Information will be destroyed (shredded) in a secure manner before disposal. All electronic storage media used in the processing of CMHC Information, including all back-up, PDSs, photocopiers and other electronic media where CMHC Information has been electronically stored, will be sanitized or destroyed, in accordance with the latest communications security establishment standards for “protected B” information when disposing of such media, or when return or destruction of CMHC Information is required pursuant to this Agreement (as applicable).
11. The SO Holder’s Data Custodian agrees to establish and maintain an inventory of all data files received from CMHC, as stated in **Exhibit 1 to SCHEDULE E - Responsibilities of the Data Custodian**.

## EXHIBIT 1 TO SCHEDULE E - RESPONSIBILITIES OF THE DATA CUSTODIAN

The Data Custodian, designated by SO Holder will implement the following requirements:

1. Prepare a document for the use of the SO Holder's employees and contractors engaged by the SO Holder, outlining the terms and conditions governing the use of CMHC Confidential Information, as well as the procedures to send, receive, handle and store CMHC Confidential Information (hereinafter the "Confidentiality Document"). The Confidentiality Document will include the following terms and conditions of this Agreement:
  - i. Confidentiality of CMHC's Confidential Information, as specified in the Agreement;
  - ii. Use of CMHC's Confidential Information, as specified in the Agreement;
  - iii. Access to CMHC's Confidential Information, as specified in the Agreement; and
  - iv. Security Requirements, as specified in the Agreement
2. Prior to granting access, the Data Custodian will ensure that every employee and every contractor engaged by the SO Holder who accesses CMHC Information has agreed in writing to comply with confidentiality terms no less strict than this Agreement.
3. Acknowledge receipt of each data file received from CMHC pursuant to this Agreement, and maintain a register of all such files, containing the following information:
  - Date received;
  - File name and reference period;
  - Employee at SO Holder who received the file from Member;
  - Employee at CMHC who sent the file;
  - Employee at SO Holder responsible for safekeeping of the file; and
  - Date the file was destroyed or returned to CMHC (if applicable).
4. Maintain a register of all Identified Persons who have been granted access to the data files received from CMHC by SO Holder, containing the following information:
  - i. File name and reference period;
  - ii. Name of employee or/and contractors engaged by the SO Holder to whom access is given;
  - iii. Justification for access;
  - iv. Name of delegated manager who authorized access and date of authorization; and
  - v. Start and end dates of period for which access is authorized.

## SCHEDULE F - PRIVACY/SECURITY CONTROLS QUESTIONNAIRE

### Information Security Assessment of SO Holders IT Infrastructure

SO Holders must demonstrate in advance of joining the Standing Offer that they have the required IT infrastructure in place to safeguard CMHC’s information (such as Protected B information and/or personal information).

All successful respondents will be asked to complete the Privacy/Security Controls Questionnaire.

Those that pass the questionnaire will be able to respond to call-ups that require the collection or use of Protected B and/or personal information. Those that fail the questionnaire, will only be permitted to respond to call-ups that do not involve collection and/or use of Protected B information or other personal information.

**SO Holders must provide the completed Schedule F – Privacy/Security Controls Questionnaire within 5 days of qualification notification.**

PRIVACY/SECURITY CONTROLS	RESPONSE/CONFIRMATION OF EXISTING CONTROLS
<p><b>1. Privacy Governance - Responsibility and Accountability for Policies and Procedures</b></p> <p>Responsibility and accountability are assigned to a person or group for developing, documenting, implementing, enforcing, monitoring, and updating the organization’s privacy policies and procedures.</p>	
<p><b>2. Privacy Incident and Breach Management</b></p> <ul style="list-style-type: none"> <li>▪ A documented privacy incident and breach management program has been implemented that includes, but is not limited to, the following: Procedures for the identification, management, and resolution of privacy incidents and breaches;</li> <li>▪ Defined responsibilities;</li> <li>▪ A process to identify incident severity and determine required actions and escalation procedures;</li> <li>▪ A process for complying with breach laws and regulations, including stakeholders and breach notification, if required;</li> </ul>	

<ul style="list-style-type: none"> <li>▪ An accountability process for employees or third parties responsible for incidents or breaches with remediation, penalties, or discipline as appropriate;</li> <li>▪ A process for periodic review (at least on an annual basis) of actual incidents to identify necessary program updates based on: incident patterns and root cause; and changes in the internal control environment or external requirements (regulation or legislation);</li> <li>▪ Periodic testing or walkthrough process (at least on an annual basis) and associated program remediation as needed.</li> </ul>	
<p><b>3. Compliance, Monitoring and Enforcement</b></p> <p>Compliance with privacy policies and procedures, commitments, service-level agreements, and other contracts will be reviewed and documented, and the results of such reviews reported to management. If problems are identified, remediation plans are developed and implemented.</p>	
<p><b>4. Privacy Training</b></p> <p>A privacy education and communication program is in place and supported by a monitoring system that confirms all employees and/or contractors are trained.</p>	
<p><b>5. Third Party Protection of Personal Information</b></p> <p>The organization has procedures in place to evaluate that the third parties have controls to meet the terms of the CMHC agreement, instructions, or requirements.</p>	
<p><b>6. Privacy by Design (PbD)</b></p>	

<p>Privacy by Design is proactively embedded in the proposed program/activity throughout the entire life cycle end to end. Therefore it is ensured that privacy is built into the design, operation, and management from the start. The organization can also articulate and demonstrate the “positive sum” (e.g. no trade offs; win/win) characteristics of program/activity.</p>	
<p><b>7. Retention and Storage of Personal Information</b></p> <p>Please describe your policies and procedures.</p>	
<p><b>8. Disposal, Destruction and Redaction of Personal Information</b></p> <p>Personal information no longer needed is de-identified, anonymized, disposed of, or destroyed in a manner that prevents loss, theft, misuse, or unauthorized access.</p>	
<p><b>9. Security in Privacy Policies</b></p> <p>The organization’s privacy policies (including any relevant security policies), address the security of Personal Information.</p>	
<p><b>10. Safeguarding of Personal Information</b></p> <p>Personal information is protected, from start to finish, using administrative, technical and physical safeguards to prevent loss, misuse, unauthorized access, Disclosure, alteration, and destruction. Please explain how you meet security controls based on a security framework, such as or equivalent to:</p> <ul style="list-style-type: none"> <li>▪ ISO27001:2013</li> <li>▪ ITSG-33</li> <li>▪ SOC 1 Report</li> <li>▪ SOC 2 Report</li> <li>▪ CSEA 3416</li> </ul>	

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Alternatively, if you are using a third-party provider to manage your network (such as Bell Canada or Rogers or Microsoft), SOC reports are available through your provider and will satisfy this requirement.

## **11. Logical Access to Personal Information**

Logical access to Personal Information is restricted by procedures that address the following matters:

- a) Authorizing and registering internal personnel and individuals;
- b) Identifying and authenticating internal personnel and individuals;
- c) Making changes and updating access profiles;
- d) Granting privileges and permissions for access to IT infrastructure components and Personal Information;
- e) Preventing individuals from accessing anything other than their own personal or sensitive information;
- f) Limiting access to Personal Information to only authorized internal personnel based upon their assigned roles and responsibilities;
- g) Distributing output only to authorized internal personnel;
- h) Restricting logical access to offline storage, backup data, systems, and media;
- i) Restricting access to system configurations, super user functionality, master passwords, powerful utilities, and security devices (for example, firewalls); and
- j) Preventing the introduction of viruses, malicious code, and unauthorized software.

<p><b>12. Physical Access Controls</b></p> <p>Physical access is restricted to Personal Information in any form (including the components of the entity's system(s) that contain or protect Personal Information). Controls are in place to ensure the confidentiality, availability and integrity of the Personal Information.</p>	
<p><b>13. Environmental Safeguards</b></p> <p>Personal information, in all forms, is protected against accidental Disclosure due to natural disasters and environmental hazards.</p>	
<p><b>14. Transmitted Personal Information</b></p> <p>Personal information collected and transmitted over the internet, over public and other non-secure networks, in the cloud and over wireless networks is protected.</p>	
<p><b>15. Storage of Personal Information/Technical Safeguards</b></p> <p>Personal information is stored securely. For example:</p> <ul style="list-style-type: none"> <li>▪ Biometrics;</li> <li>▪ Passwords;</li> <li>▪ Passwords changed every 90 days;</li> <li>▪ Password protected screensavers;</li> <li>▪ Session time out security;</li> <li>▪ Firewalls;</li> <li>▪ Intrusion detection systems;</li> <li>▪ Virtual private networks (VPN);</li> <li>▪ GoC(Government of Canada) Public Key Infrastructure Certificates;</li> <li>▪ External Certificate Authority (CA); and</li> <li>▪ Audit trails.</li> </ul>	
<p><b>16. Testing Security Safeguards</b></p> <p>Tests of the effectiveness of the key administrative, technical, and physical</p>	

<p>safeguards protecting Personal Information are conducted periodically including a Threat and Risk assessment (TRA) or similar security assessment.</p>	
<p><b>17.1 Openness</b></p> <p>Information about an organization's privacy policies and procedures, including the name of the Privacy Officer and their responsibilities, are user-friendly, communicated and made readily available to the public, internal personnel and third parties who need them.</p>	
<p><b>17.2 Openness</b></p> <p>Privacy policies are documented in writing, made publicly available, and are current and up-to-date, which demonstrate commitments to protect privacy, in user-friendly terms.</p>	

**APPENDIX F- TEMPLATE 1: RESPONDENT QUALIFICATIONS: MANDATORY MINIMUM REQUIREMENTS: RESEARCH PROJECT TEAM (MTR.2)**

<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 managing project resources, including project staff and sub-contractors, providing overall quality assurance for the project and its deliverables, and serving as primary point of contact with CMHC.		<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)		Meets	Does Not Meet
	Dates	Job Title/Organization		
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		Meets	Does Not Meet
	Project Year	Project Year		
	1.			
	2.			
	3.			
	4.			
5.				

<b>SENIOR RESEARCHER (SR) (Complete ONE for each SR on your application):</b> 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.		<b>Evaluation (to be completed by CMHC)</b>	
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. Project/Role Year	Meets	Does Not Meet
	1. _____		
	2. _____		
	3. _____		
	4. _____		
5. _____			
3. A graduate or post-graduate university degree in the social sciences, urban and/or regional planning, public policy, economics, engineering, architecture, building sciences, environmental sciences, or related field or demonstrated equivalent experience	Education or equivalent experience: Degree or Equivalency/Field/Institution Year	Meets	Does Not Meet
	_____		
	_____		

<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. Experience working on at least three (3) projects/ assignments related to the research area(s) (may include university/college work)	Project Experience:		Meets	Does Not Meet
	Project title/role	Year		
	1.			
	2.			
	3.			
2. Post-secondary education (i.e. degree, diploma or certificate) in the social sciences, urban and/or regional planning, public policy, economics, engineering, architecture, building sciences, environmental sciences, or related field	Education Project Experience:		Meets	Does Not Meet
	Degree, Diploma or Certificate/Field/ Institution			
	Year			

## **APPENDIX G - TEMPLATE 2: QUALIFICATIONS AND EXPERIENCE, RESEARCH COMPETENCIES, AND SPECIALIZED KNOWLEDGE**

### **Template 2: Stream 1: Social and Statistical Research**

Part 1: Qualifications and Experience

Part 2: Research Competencies

Part 3: Specialized Knowledge

### **Template 2: Stream 2: Technical Research**

Part 1: Qualifications and Experience

Part 2: Research Competencies

Part 3: Specialized Knowledge

### **Template 2: Stream 3: Housing Finance and Market Analysis**

Part 1: Qualifications and Experience

Part 2: Research Competencies

Part 3: Specialized Knowledge

**Template 2 – STREAM 1: SOCIAL AND STATISTICAL RESEARCH**  
**Part 1: Qualifications and experience**

**Senior Researcher/Principal Investigator** \_\_\_\_\_

**OR**

**Researcher** \_\_\_\_\_

(Please complete for each SR/PI and Researcher)

**This Template has three parts – (1) Education and professional experience, (2) Research competencies and (3) Specialized knowledge**

**PART 1:** Please provide a short description, using examples, that demonstrate the following:  
**Refer to Appendix C – RFSO Specifications, Stream 1: Social and Statistical Research of the RFSO**

**1. Education and professional experience:**

**2. Demonstrated experience using social science theories, analytical approaches, and quantitative and/or qualitative research methods**

**Template 2 – STREAM 1: SOCIAL AND STATISTICAL RESEARCH**

**Part 2: Research competencies**

**PART 2: Research Competencies**

- Individuals must demonstrate a **minimum of three (3) research competency areas (Refer to Appendix C– RFSO Specifications, Stream 1: Social and Statistical Research)**, using examples from three (3) of the most relevant research projects from the last five (5) years.
- 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.
- Individual responses should not exceed 500 words. Content exceeding the word limit 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.

**Minimum of Three (3) Research Competencies**

Applicants may add cells as appropriate to include additional competencies.

**Competency 1 (from Appendix C– RFSO Specifications, Stream 1: Social and Statistical Research)**

**Competency 2 (from Appendix C– RFSO Specifications, Stream 1: Social and Statistical Research)**

**Competency 3 (from Appendix C – RFSO Specifications, Stream 1: Social and Statistical Research)**

**Template 2 – STREAM 1: SOCIAL AND STATISTICAL RESEARCH**

**Part 3: Specialized knowledge**

**PART 3: Specialized Knowledge**

- Individuals must demonstrate a **minimum of one (1) area of specialized knowledge (Refer to Appendix C – RFSO Specifications, Stream 1: Social and Statistical Research)**.
- Please indicate areas of specialized knowledge and provide a short description of your experience, using project examples.
- Individual responses should not exceed 500 words. Content exceeding the word limit will not be reviewed or evaluated.

**Minimum of One (1) Specialized Knowledge Area**

Please add cells as required to identify additional areas of Specialized Knowledge

**Official Languages**

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

**Template 2 – STREAM 2: TECHNICAL RESEARCH**

**Part 1: Qualifications and experience**

**Senior Researcher/ Principal Investigator** \_\_\_\_\_ **OR**  
**Researcher** \_\_\_\_\_  
(Please complete for each SR/PI and each Researcher)  
**This Template has three parts – (1) Education and professional experience, (2) Research competencies and (3) Specialized knowledge**

**PART 1:** Please provide examples that demonstrate the following:  
**Refer to Appendix C – RFSO Specifications, Stream 2: Technical Research of the RFSO.**

**1. Education and professional experience:**

**2. Demonstrated experience applying scientific and/or engineering principles, analytical approaches and empirical research methods.**

**3. Demonstrated experience in planning and implementing technical or research projects relevant to the residential sector.**

**Template 2 – STREAM 2: TECHNICAL RESEARCH**  
**Part 2: Research competencies**

**PART 2: Research Competencies**

- Individuals must demonstrate a **minimum of three (3) research competency areas** (Refer to Appendix C – RFSO Specifications, Stream 2: Technical Research), using examples from three (3) of the most relevant research projects from the last five (5) years.
- 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.
- Individual responses should not exceed 500 words. Content exceeding the word limit 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.

**Template 2 – STREAM 2: TECHNICAL RESEARCH**  
**Part 2: Research competencies**

**Minimum of three (3) Research Competencies**

Applicants may add cells as appropriate to include additional competencies.

**Competency 1 (from Appendix C – RFSO Specifications, Stream 2: Technical Research)**

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**Competency 2 (from Appendix C – RFSO Specifications, Stream 2: Technical Research)**

**Competency 3 (from Appendix C – RFSO Specifications, Stream 2: Technical Research)**

**Template 2 – STREAM 2: TECHNICAL RESEARCH**

**PART 3: Specialized knowledge**

**PART 3: Specialized Knowledge**

- Individuals must demonstrate a **minimum of one (1) area of specialized knowledge (Refer to Appendix C – RFSO Specifications, Stream 2: Technical Research).**
- Please indicate areas of specialized knowledge and provide a short description of your experience, using project examples.
- Individual responses should not exceed 500 words. Content exceeding the word limit will not be reviewed or evaluated.

**Minimum of One (1) Specialized Knowledge Area**

Please add cells as required to identify additional Specialized Knowledge areas (from Appendix C – RFSO Specifications, Stream 2: Technical Research)

**Official Languages**

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

**Template 2 – STREAM 3: HOUSING FINANCE AND MARKET ANALYSIS**

**PART 1: Qualifications and experience**

**Senior Researcher/Principal Investigator** \_\_\_\_\_ **OR**

**Researcher** \_\_\_\_\_  
(Please complete for each SR/PI and each Researcher)

**This Template has three parts – (1 Education and professional experience, (2) Research competencies and (3)Specialized knowledge**

**PART 1:** Please provide examples that demonstrate the following:  
**Refer to Appendix C – RFSO Specifications, Stream 3: Housing Finance and Market Analysis of the RFSO**

**1. Education and professional experience:**

Empty response area for item 1.

**2. Proficiency using advance relevant data management and analytical software, including SAS, EVIEW, MATLAB or other statistical software.**

Empty response area for item 2.





**Competency 2 (from Appendix C – RFSO Specifications, Stream 3: Housing Finance and Market Analysis)**

**Competency 3 (from Appendix C – RFSO Specifications, Stream 3: Housing Finance and Market Analysis)**

## Template 2 – STREAM 3: HOUSING FINANCE AND MARKET ANALYSIS

### PART 3: Specialized knowledge area

#### PART 3: Specialized Knowledge

- Individuals must demonstrate a **minimum of one (1) area of specialized knowledge (Refer to Appendix C – RFSO Specifications, Stream 3: Housing Finance and Market Analysis)**
- Please indicate areas of specialized knowledge and provide a short description of your (and your firm's) experience, using project examples.
- Individual responses should not exceed 500 words. Content exceeding the word limit will not be reviewed or evaluated.

#### Minimum of One (1) Specialized Knowledge Area

Please add cells as required to identify additional areas of Specialized Knowledge (from Appendix C – RFSO Specifications, Stream 3: Housing Finance and Market Analysis)

#### Official Languages

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