



## REQUEST FOR PROPOSAL (“RFP”)

<b>RFP Title:</b> IDRC Public Website	<b>RFP #:</b> 15160014
<b>Issue Date:</b>  Wednesday, July 28, 2015	<b>Close Date &amp; Time:</b>  Tuesday, September 8, 2015 at 1:00 p.m. Eastern Daylight Time
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## SECTION 1 – INTRODUCTION

The purpose of this section is to provide general information about the International Development Research Centre (“IDRC”) and this RFP.

### 1.1 IDRC OVERVIEW

IDRC is a **Canadian Crown Corporation** established by an act of Parliament in 1970.

IDRC was created to help developing countries find solutions to their problems. It encourages, supports, and conducts research in the world’s developing regions, and seeks to apply new knowledge to the economic and social improvement of those regions. IDRC aims to reduce poverty, improve health, support innovation, and safeguard the environment in developing regions.

IDRC employs about 375 people at its Ottawa, Ontario, Canada head office and at its four (4) global regional offices (Cairo-Egypt, New Delhi-India, Nairobi-Kenya, and Montevideo-Uruguay).

For more details visit: [www.idrc.ca](http://www.idrc.ca)

### 1.2 PURPOSE OF THIS RFP

IDRC requests proposals for the provision of **web development and support services** for the period from **October 7, 2015** to **March 31, 2016** for the creation of its new public website, where requirements are described in section 2, the Statement of Work (“Services”).

### 1.3 DOCUMENTS FOR THIS RFP

The documents listed below form part of and are incorporated into this RFP:

- This RFP document
- Annex **A** – Resulting Contract Terms and Conditions
- Annex **B** – Mandatory (M) Requirements Checklist
- Annex **C** – Rated (R) Requirements Checklist
- Annex **D** – Additional Information
- Annex **E** – Scenarios for Shortlisted Proponents

### 1.4 TARGET DATES FOR THIS RFP

The following schedule summarizes significant target events for the RFP process. The dates may be changed by IDRC at its sole discretion and shall not become conditions of any Contract that may be entered into by IDRC and the selected Proponent.

#	Event	Date
1	RFP issue date	See page 1
2	Deadline for Enquiries	See Section 5.1
3	RFP close date	See page 1

4	Evaluation, selection and notification of shortlisted Proponent(s)	September 8-22, 2015
5	Presentations/Demos by shortlisted Proponent(s)	September 23-29, 2015
6	Evaluation, selection and notification of Lead Proponent	October 2, 2015
7	Finalize Contract with Lead Proponent	October 5, 2015
8	Commencement of Services	October 7, 2015

## SECTION 2 – STATEMENT OF WORK

This section is intended to provide Proponents with the information necessary to develop a competitive proposal. The Statement of Work (“SOW”) is a complete description of the tasks to be done, results to be achieved, and/or the goods to be supplied.

### 2.1 INTRODUCTION AND PROJECT OVERVIEW

#### Objective:

The purpose of IDRC’s website is to market IDRC’s research funding programs and communicate the results of that funded research with its target audiences. IDRC has a requirement for an entirely new infrastructure and system other than SharePoint for its website. IDRC is looking for a firm to: assist in selecting a new hosting solution; propose a new content management solution; and design, develop and deploy the new site.

#### Alignment with business goals:

IDRC’s website aligns with our corporate business goals by:

- **Promoting** funding opportunities among the global research community
- **Disseminating** the results of the research IDRC funds
- **Supporting** the work of grantees through access to project management resources
- **Helping** to recruit qualified staff
- **Positioning** IDRC as prudent steward of Canadian taxpayer funds and a valuable asset to Canada’s international development efforts

#### Key target audiences:

- **Researchers** from Canadian and developing-countries, specifically those exploring the same themes and issues as IDRC
- **Canadian government officials**, especially Parliamentarians, and the Minister of International Development
- **Donors**, includes government departments and development agencies, crown corporations, public and private foundations, funding councils, and the private sector.
- **Academic** global community
- **Canadians** interested in international development
- **Media**
- **Non-governmental organizations** (NGOs) who undertake or support research

#### Goals:

- **To showcase** the results of funded research in a variety of forms, case studies, success stories, technical reports, etc.
- **To educate** new visitors and expand repeat visitors’ awareness of all activities in which IDRC is involved

- **To emphasize** IDRC’s leadership in development research as a way to leverage our reputation and build our brand, especially in Canada
- **To highlight** IDRC as a leading source of research funding
- **To underscore** IDRC’s collaborative successes and openness to new partnerships
- **To recruit** talented individuals to work with and for IDRC

### Guiding Principles:



- The website will provide a rich user experience and will disseminate the outputs of the research the centre supports in a variety of media and formats;
- Content creation will be decentralized;
- Quality control processes, site organization, navigation and design will be centrally coordinated;
- The website must meet or exceed web accessibility guidelines established by the Government of Canada;
- To the extent possible, best practices and global standards, such as those of W3C, will be adopted to create, manage, and improve the user experience on IDRC’s website;
- The website will incorporate a responsive design to automatically serve up content appropriate to the platform used by site visitors. This will include mobile devices, tablets, and desktops using a variety of web browsers and apps;
- Content will be managed and archived based on rules and retention schedules tied to content type. Time bound content, like an event, need not be archived. Content of lasting value, like annual reports and feature articles, will be available in an archive on the website; and
- The website will be able to provide content in at least three (3) languages, English, French, and Spanish. Not all content provided in English and French will be provided in the other languages.

## 2.2 BACKGROUND INFORMATION

### Current Website Metrics

Following section outlines information about the website’s traffic and inventory.

#### Traffic volume<sup>1</sup>

Metric  Dates  (month/year)	User Sessions	Page views	Pages/session	Avg. session length (mins:secs)
04/08 – 03/09	4,156,471	11, 078,881	2.67`	02:08
04/09 – 03/10	4, 346, 091	10, 942, 187	2.52	02:05
04/10 – 03/11	5, 336, 625	12, 325, 390	2.31	01:54
04/12 – 03/13	1,165,908	3, 197,057	2.74	02:41

04/13 – 03/14	1,165, 347	3, 035, 802	2.61	03:27
04/14-03/15	984, 372	2, 575, 115	2.62	03:03

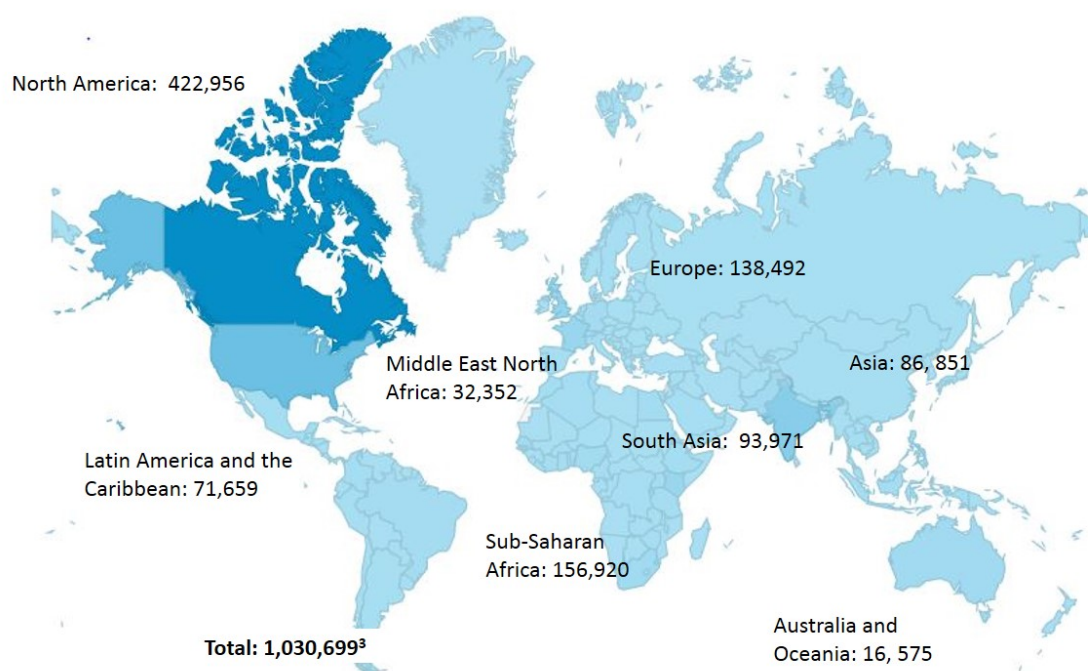
<sup>1</sup> Please note Google Analytics definitions of terms has changed over the time period charted above. User sessions were previously visits. This chart includes data to which both terms were applied.

### Traffic sources<sup>2</sup>

Search Engines (organic)	Direct traffic (bookmarks, etc.)	Referrals	Email (bulletin)	Twitter	Facebook
517, 054	264, 514	161, 031	19, 360	3,424	9,482

<sup>2</sup> Data for past fiscal year 04/14 – 03/15

### Audience Location<sup>3</sup>



<sup>3</sup> Total does not include those visitors whose location could not be captured and whose location appears as “not set” in Google Analytics.

### Current Website Infrastructure

IDRC’s public website ([www.idrc.ca](http://www.idrc.ca)) runs on a custom developed SharePoint web content management system (WCMS) environment hosted internally.



### **Web Front End:**

CPU: 6 CPU's at 2.3GHz; Memory: 12GB; Disk: 100GB

- **IIS:** Internet Information Services 7
- SharePoint Server 2010
- Search: SharePoint Enterprise Search

### **SQL Server:**

CPU: 6 CPU's at 2.3GHz; Memory: 12GB; Disk: 200GB

- **Database:** Microsoft SQL Server 2008 R2

### **Forefront Threat Management Gateway (TMG) Server:**

CPU: 2 CPU's at 2.3GHz; Memory: 2GB

- **TMG version:** Microsoft TMG 2010

### **Auxiliary Database (IDRC\_INT)**

This MS-SQL database is located in the same SQL Server as the current SharePoint Public Website. It contains caching data from the following Legacy Systems:

- IDRC Staff Directory
- IDRC Development Research Information System (IDRIS)
- IDRC Digital Library (IDL) database

Manual processes extract data from these systems into a separate single database (28 tables) periodically (monthly but can be run on demand).

The information contained in the database, allow displaying within specific pages of the website:

- Project information queried according different criteria, like: Region, Themes, Program and Keywords.
- Lists of all publications related to a particular project
- Program staff lists.

### **Enterprise Metadata Repository (EMR)**

This MS-SQL database contains all the IDRC metadata, individual rollups into categories, and their translations to be used by all corporate systems. The metadata types includes keywords/subject terms, geographic codes and themes. The system is currently under development but is expected to be operational by September 2015.

### **Current Website Inventory**

- **Sub Sites:** 163  
Program Sub Site example: [Agriculture and Food Security](#)  
Theme Sub Site example: [Science and Technology](#)  
Region Sub Site example: [Middle East and North Africa](#)

- **Pages:** 2,921 (Distributed within the 163 sub sites. Not all these pages will be migrated.)
- **Images:** 7,434
- **Documents:** 3,102 (Distributed within the 163 sub sites)
- **OpenEBooks:** A collection of 455 full text electronic books. Each one is a folder containing a set of xml and image files. There are a total of 18,057 files.

### Corporate Documents: 120

Documents include but are not limited to Annual Reports, Quarterly Financial Reports, and other Strategic Documents in both English and French.

### Generic Lists: 21

Lists include 3 used as auxiliary mappings and each of the remaining 18 lists correspond to a specific content type in English and French such as: Calls, Closed Competitions, Competitions, Country Profiles, Events, News, Profiles, Publications, and Results. They contain a consolidated total of 5,580 items. Most of these lists should be migrated.

### Interactive Maps: 7

Map example: [Canadian International Food Security Research Fund](#)

Each map contains a number of items. A consolidated total of 314 items. All these maps will not be migrated but interactive maps will need to be created on the new website.

### Storage Metrics (Database Size)

The database (DB) currently does not exceed 20 GB. The auxiliary DB containing cached data from Staff Directory, IDRIS and IDL does not exceed 40 MB.

Site	Total Size	% of Parent
IDRC (English and French)	17505.6MB	97.42 %
Images	558.4 MB	3.10 %
Documents	496.4 MB	2.76 %
Lists	5.7 MB	0.02 %
Workflow History	2.7 MB	0.02 %
Templates and specific Pages	2.5 MB	0.01 %

## 2.3 CURRENT WEBSITE DEFICIENCIES

### Performance

- Page load time has not been optimized. Embedded JavaScript and other nonstandard html prolongs load times.

- The search function performs poorly, often not at all.

### **Content**

- The current workflow doesn't provide a preview function to ensure the quality of content prior to publishing. It is also difficult to track content through the editing, translating and publishing process.
- The current WYSIWYG interface is not ideal as it is not easily configurable nor flexible; it adds unwanted line breaks and formatting changes. Does not provide standard document structure option such as H1, H2, H3 ... for header tags.
- Lack of tools for management of digital media assets (audio, video, images). The embedding feature is not well supported, especially for video. No image manipulation/editing tools (resizing, compressing, adding captions). Integrated image editor is inadequate, no control to limit size of images uploaded.
- Unfriendly URLs – a system generated URL that is overly long and does not include page / content object titles.
- Updating and adding metadata is not easy.

### **Structure**

- Site does not comply with Government of Canada accessibility (WCAG) standards.
- Site automatic validation and broken link is not available.
- No adequate means to archive content.
- Complex process to make updates to Templates.
- Complexity to add languages: French and English sites are a basic requirement, but should provide support for other languages – Spanish and Arabic for example.
- Moving content is complex and problematic.
- No easy controls for analytics tools (Google Analytics).
- No support for Social Media integrations (share/follow buttons).
- No support for RSS feeds part for automated sharing.
- Technology (.net) requires an advanced programmer to implement changes and enhancements.
- System should support various roles and permission levels that provides designated “power users” with tools to create or modify page templates and other general page elements without any advance knowledge of code.

## **2.4 DESCRIPTION AND SCOPE OF WORK**

### **In Scope:**

#### **1) Analyze and recommend the best option(s) for hosting the idrc.ca Website**

- The successful Proponent will analyze work with the IDRC team to recommend the right hosting solution for IDRC's web property.

- Option(s) could be to continue with an onsite hosted solution or move to a 3<sup>rd</sup> party vendor hosted, cloud computing or Software as a Service (SaaS) solution.
- Hosting solution should support the recommended system described below in the 2) *Recommend and implement a Content Management System (CMS)* section.

## 2) Recommend and implement a Content Management System (CMS)

- The successful Proponent will implement the recommended CMS. The proposal must include the following:
  - a. A recommendation for a CMS solution that is a well supported and documented either open source or proprietary.
  - b. A CMS that is well suited to IDRC's needs that is able to respond to the features described below in the 3) *Design & Development* section. Note: IDRC is open to any CMS platform other than SharePoint.
  - c. A description of the technology and programming language, the global adoption of the solution, and available community support tools and network.

## 3) Design & Development

The successful Proponent will formally lead and participate in daily scrums with IDRC as per Agile methodology through the design and development of the new site.

### Design

The successful Proponent will **design** new templates based on *sample wireframes* found in Annex **D** and on the *IDRC Web Style Guide* that will be provided upon contract award.

- Design concepts for each page template/type will be required before moving to development.

### Development

The successful Proponent will use GIT as the formal source code management tool to develop and deploy the new site and their releases. Only after the first release, the repository will be managed using GIT. The Proponent will commit, comment, and tag in GIT at a frequency, which follows the proposed feature release timeline, following coding best practices. Once the contract has reached a conclusion, the repository will become IDRC property.

Using the recommended CMS, the new website **MUST** have the following **FEATURES**:

### Performance

- **Low bandwidth:** many stakeholders have limited Internet bandwidth. The website must perform with minimal resource requirements.
- **Caching:** ability to maximize performance using caching or a “dynamic to static” solution.
- **Search:** search feature should provide the ability to filter results, auto complete, shows results progressively, look ahead (show size/scope of results).
- **Responsive design:** recognizing the user's device accessing the site and serves up the relevant content to “fit” the device. (desktop, mobile, tablets, ...)

## Content

- **Search Engine Optimization:** supports user friendly/search engine friendly URLs, customize Page title, meta description, meta keyword, taxonomy, supports canonical tags and allows for automatic creation of XML site maps.
- **Access control:** distinct roles and workflows with varying levels of access and control based on assigned roles.
- **Workflow management:** easy to create and manage workflows, support for translation, ability to apply workflow to all page templates. It should include an automated publishing feature to schedule content for publishing. Content must be traceable throughout the review and publishing process.
- **Content creation and editing:** easy to create content templates/forms.
- **Content management:** allows for managing content lifecycle, scheduled content publishing with automatic removal and/or archiving, review by dates, versioning.
- **Content preview:** prior to publishing.
- **Automated templates:** create standard output templates (usually HTML and XML) that can be automatically applied to new and existing content.
- **Embedded content:** allows for embedding content in a variety of formats associated with images, video, audio, and interactive features.
- **Upload content:** Ability to restrict file types. Ability to add file size restrictions.
- **Easily editable content:** WYSIWYG text editor should be able to integrate template styles for easy authoring; can switch between WYSIWYG and HTML; and provide an integrated image editing (smart resizing, cropping, image properties, effect filters, format conversion).

## Structure

- **Accessibility:** is fully compliant with WCAG 2.0 standards.
- **Web standard upgrades:** Automatically receives regular notifications about updates and new feature sets.
- **Site metrics** ability to integrate with Google analytics
- **Scalable/ extensible feature sets:** integrate widgets and third-party plug-ins to extend site features (e.g. Google maps API, photo gallery/slideshows).
- **Metadata:** easy to use metadata management and content tagging tools based on defined keywords/metadata of web pages and individual content objects. Will need to also synchronize with IDRC Enterprise Metadata Repository. (see Annex D)
- **Social media integration:** Twitter feeds and other RSS feeds, share buttons, follow buttons, etc.
- **Content syndication:** RSS feeds/web part for automated sharing, may also e-mail users when updates are available as part of the workflow process.
- **Multilingual:** interface and toolsets for a minimum of three (3) languages: English, French and Spanish with the capability of adding more such as Arabic.
- **Navigation:** allows for dropdown menus, megamenu, site maps and breadcrumbs.
- **Databases:** must be able to integrate data from other databases, including legacy databases.
- **User Management:** must be able to sync with Active Directory Federated Services (ADFS)

- **Archival:** The ability to export the content/pages offsite for archival purposes.

### **Considerations**

If the proposed solution is a Software as a Service (**SaaS**) / cloud solution, IDRC needs to understand, in order to protect IDRC:

- Where the content is hosted (e.g. US, Canada, etc.).
- How to export the content out to local servers.
- What are the backup capabilities.
- How to recover for disaster.
- How the monitoring and notification process on hacking / breach activities works.

### **“Nice to have” features**

- Advanced SEO tools.
- Blogging capabilities.
- Integration with Digital Asset Management (DAM).
- Ability to create clean permalink structure (for content moved from active pages to archive).
- Automatic link validation.
- Personalization based on audience group.
- Incorporates A|B and or multivariate testing methods.
- Ability to activate or hide content modules/knowledge objects.
- Version control/comparison and recovery of content.
- Advanced (configurable) custom WYSIWYG editor elements (e.g. table and div).
- Polling, user-generated content (comments reviews, rating).
- Wikis, discussions groups (moderated and open).
- Ability to create microsites/web portals or expand implementation across multiple domains.

## **4) Migration**

- Develop a plan for migrating all content.
- Migration of all IDRC approved content from current website to new website/CMS solution.
- Implement and deploy redirect and 404 strategies. For example, OpenEbooks need to keep the same URL to avoid broken links.

## **5) Testing**

- Prepare a testing plan.
- Conduct usability testing for a selected 3-4 stakeholders from each of the following target audiences:
  - Researchers and Academics in Canada and abroad;
  - Canadian Government officials;
  - Donors and NGOs; and

- Canadians.
- Submit a usability test report and recommendations

## 6) Documentation and training

- Prepare maintenance and technical documentation for the maintenance of the website in English (if available, also provide in French).
- Deliver training to the IDRC team.

## 7) Maintenance and support

- The Proponent is to define its **warranty period** once the website is live and outline what is covered under the warranty period.
- After the warranty period is over, the Proponent is to be available to **respond and support the website for a period of one (1) year as and when required**, with options to renewal for additional years. The Proponent is to fully describe what is covered under its maintenance and support offering such as but not limited to:
  - *Hours of coverage and days of coverage, including days not covered* (e.g. Boxing Day)
  - *Response times and priority definitions* (e.g. One hour for issues classified as urgent, two hours for issues classified as high priority-critical, four hours for issues classified normal priority-minor, eight hours for issues classified as low priority-trivial)
  - *Services provided* (e.g. “Bug fixes to existing solution”; “System fine tuning and optimization”; “Development: site enhancements, new features and functions”, etc.)
- The successful Proponent will use the existing IDRC issue tracking system (**Jira**) for bug tracking and resolution.

### Out of Scope:

- Content creation

## 2.5 PROJECT SCHEDULE & DELIVERABLES

Suggested Key dates and Milestones: (Proponent to propose its detailed project schedule in its response; dates will then be confirmed/finalized at the project kick-off meeting.)

- **Kick-off meeting:** October 7, 2016  
*Deliverable: Recommendations for hosting and CMS solution; and Project Plan*
- **Prototype site ready for review:** January 15, 2016  
*Deliverable: Prototype site*
- **Final site ready for deployment:** March 21, 2016  
*Deliverable: Final site*
- **Training:** March 22-24, 2016  
*Deliverable: Maintenance documentation; and Training*
- **Support deployment:** March 28-30, 2016 (This is a fixed date.)

## **2.6 PROJECT MANAGEMENT AND RISK ASSESSMENT**

- Lead and participate in daily scrums with IDRC as per Agile methodology.
- Assess any potential risks and resolutions throughout the project lifecycle.
- Weekly progress reports to be submitted via IDRC Template Reporting form.

## **2.7 IDRC RESPONSIBILITIES, SUPPORT, AND REPRESENTATIVES**

IDRC will identify a Project Authority to whom the successful Proponent will report during the period of a resulting Contract. The Project Authority will be responsible for coordinating the overall delivery of service providing, as required, direction and guidance to the Proponent, monitoring Proponent performance, and accepting and approving Proponent deliverables on behalf of IDRC. Should any report, document, good, or service not be in accordance with the requirements of the Statement of Work and to the satisfaction of the Project Authority, as submitted, the Project Authority shall have the right to reject it or require its correction at the sole expense of the Proponent before recommending payment.

The Project Authority will ensure that appropriate subject matter experts from within IDRC are available to the Proponent to discuss and provide content material, as well as facilitate cooperation with regional IDRC staff and other stakeholders, as required.

IDRC will identify a Contracting Authority, who will oversee a resulting Contract throughout its lifecycle, in conjunction with the Project Authority and the Proponent, create amendments for any changes to a resulting Contract, answer questions on terms and conditions, and manage the receipt and payment of invoices.

## **2.8 LOCATION OF WORK AND TRAVEL**

It is expected that most of the work can take place at the Proponent's office location. However, IDRC can accommodate for work to take place at IDRC (150 Kent Street, Ottawa, ON) in co-ordination with IDRC's Project Authority. For onsite work, IDRC will provide the necessary workstation (if required) and facilities for on-site meetings.

IDRC **will not** compensate the Proponent for any travel and living expenses.



## SECTION 3 – PROPOSAL EVALUATION

This section describes the process that IDRC will use to evaluate Proposals and select a Lead Proponent.

### 3.1 EVALUATION COMMUNICATION

During Proposal evaluations, IDRC reserves the right to contact or meet with any individual Proponent in order to obtain clarification of its submission or to gain insight into the quality and scope of relevant services. A Proponent will not be allowed to add, change, or delete any information during the process. IDRC is in no way obligated to meet with any or all Proponents for this purpose.

### 3.2 EVALUATION METHODOLOGY

The following methodology will be used to evaluate Proposals:

#### 3.2.1 Mandatory Requirements

Each Proposal will first be examined to determine compliance with each **mandatory** requirement (“**M**”) identified in this RFP. A mandatory requirement is a minimum standard that a proposal must meet in order to be considered for further evaluation. Mandatory is defined as having substantial compliance as assessed by IDRC in its sole and absolute discretion.

A **Mandatory Requirements Checklist**, which summarizes the mandatory requirements *set out in the Statement of Work* to assist in ensuring Proponents comply with all mandatory criteria, is located at Annex B.

**Important Note:** Proposals which fail, in the sole discretion of IDRC, to meet any mandatory requirement will be eliminated from further consideration in the evaluation process.

#### 3.2.2 Rated Requirements

Responses that have met all the mandatory requirements will then proceed to the **rated** requirements (“**R**”) evaluation. **Rated** requirements will be evaluated according to the degree to which they meet or exceed IDRC’s requirements.

A **Rated Requirements Checklist**, which summarizes the *rated requirements highlighted in Statement of Work*, is located at Annex C.

#### 3.2.3 Presentations/Demos/Shortlist

From the compliant proposals, IDRC will shortlist **up to a maximum of three (3) Proponents** based on the highest scores for the rated requirements.

Shortlisted Proponents will be asked to prepare a presentation, provide a demonstration of its solution, or provide additional information prior to the final selection. IDRC reserves the right to supply more information to those Proponents who are shortlisted (see Annex E – Scenarios for Shortlist Proponents).

#### 3.2.4 Financials

Financial Proposals will be scored based on a relative pricing formula. Each Proponent will receive a percentage of the total possible points arrived at by dividing that Proponent’s total price by the lowest submitted total price. For example, if the lowest total price is \$120.00, that Proponent receives 100%

of the possible points (120/120 = 100%), a Proponent who submits \$150.00 receives 80% of the possible points (120/150 = 80%), and a Proponent who submits \$240.00 receives 50% of the possible points (120/240 = 50%).

### 3.2.5. Final Score

Total points will be calculated and IDRC may select the Lead Proposal or Proposals achieving the highest total points, subject to IDRC's reserved rights.

## 3.3 EVALUATION TABLE

IDRC will evaluate Proponent's proposals based on the following:

RFP Section	Mandatory Requirements	Weighting	Points 0-10	Score
		A	B	A x B
Throughout the RFP and Annex B	Mandatory Requirements ( <i>If Pass, proceed with evaluation process</i> )	Pass or Fail	n/a	n/a

RFP Section	Rated Requirements	Weighting	Points 0-10	Score
		A	B	A x B
Technical: Annex C	Methodology/Approach/Schedule	40		
"	Project Experience	15		
"	CMS Experience	15		
"	Proposed Resources	10		
Financial: section 4.6	Total Pricing, exclusive of taxes	20		
	<b>Total %</b>	<b>100</b>		

## 3.4 PROPONENT FINANCIAL CAPACITY

IDRC reserves the right to conduct an assessment of the Lead Proponent's financial capacity. IDRC may request that the Lead Proponent provide proof of financial stability via bank references, financial statements, or other similar evidence. The Lead Proponent must provide this information upon 72 hours of IDRC's request. Failure to comply may result in disqualification.

## 3.5 PROPONENT SELECTION

As noted in section 5.8, acceptance of a proposal does not oblige IDRC to incorporate any or all of the accepted proposal into a contractual agreement, but rather demonstrates a willingness on the part of IDRC to enter into negotiations for the purpose of arriving at a satisfactory contractual arrangement with one or more parties.

Without changing the intent of this RFP or the Lead Proponent's proposal, IDRC will enter into discussions with the Lead Proponent for the purpose of finalizing the Contract.

In the event no satisfactory Contract can be negotiated between the Lead Proponent and IDRC, IDRC may terminate negotiations. In such event, if IDRC feels that the Proponent with the second highest score may meet the requirements, IDRC will continue the process with the secondary Proponent, and so on.

Announcement of the successful Proponent will be made to all Proponents following the signing of a Contract.

## SECTION 4 – PROPOSAL FORMAT

Proposal responses should be organized and submitted in accordance with the instructions in this section.

### 4.1 GENERAL

Proposals should be in 8 1/2" x 11" (letter) format, with each page numbered. Elaborate or unnecessary voluminous proposals are not desired. The font used should be easy to read and generally be no smaller than 11 points (smaller font can be used for short footnotes).

### 4.2 OFFICIAL LANGUAGES

Proposals may be submitted in English or French.

### 4.3 ORGANIZATION OF RESPONSES

Responses should be organized as follows, where the sections that follow provide more details:

see RFP Section for full details	File	Contents
4.4	1.0	Cover Letter
4.5	1.0	Technical Proposal
4.6	2.0	Financial Proposal

### 4.4 COVER LETTER

A one (1) page covering letter on the Proponent's letterhead should be submitted and should include the following:

- a. A reference to the RFP number and RFP title.
- b. The **primary contact person** with respect to this RFP: the individual's name, address, phone number and email address.
- c. A statement confirming the **validity of the proposal** (refer to section 5.4).
- d. A statement confirming the Proponent does not have a **conflict of interest** with this RFP, real or perceived (refer to section 5.7).
- e. The letter **signed** by person(s) duly authorized to sign on behalf of the Proponent and bind the Proponent to statements made in response to the RFP.

### 4.5 TECHNICAL PROPOSAL

#### 4.5.1 Table of Contents

The Proponent should include a table of contents with page numbers for easy reference by the evaluation committee.

## 4.5.2 Response to the SOW (M)

The Proponent **MUST** provide **detailed information relative to each requirement** listed in the Statement of Work, for both Mandatory and Rated Requirements, and **MUST** clearly outline the work that the Proponent proposes to undertake for the provision of these services to IDRC.

When responding, the Proponent **MUST** complete and provide as part of its technical proposal, the response grids found in **Annex B- Mandatory (M) Compliance Checklist** and **Annex C- Rated (R) Requirement Checklist**.

## 4.6 FINANCIAL PROPOSAL

### 4.6.1 General

The Proponent should provide a *separate* response relative to the pricing of its proposed solution (reference section 5.3.2).

### 4.6.2 Financial Requirements (M)

The Proponent **MUST** provide pricing for all of its proposed Services:

- a. The Proponent is to state the assumptions underlying its financial proposal.
- b. All prices are to be quoted in **Canadian dollars (CAD)** and be exclusive of the Goods and services Tax (GST) or Harmonized Sales Tax (HST). The GST or HST, whichever is applicable, shall be extra to the prices quoted by the Proponent and will be paid by IDRC.

All prices must include a **detailed breakdown following the response to the SOW** (e.g. breakdown of design and development, breakdown of migration, breakdown of documentation and training, breakdown of one (1) year maintenance and support offering, etc.).

Where applicable, the detailed breakdown shall include, at a minimum, all-inclusive per diem rate applicable to each proposed resource and their estimated total number of billable days to do the work.

Prices for “options” / “IDRC’s list of ‘nice to haves’ ” should be outlined in a separate table if not part of the Proponents standard CMS solution. *Note:* these prices will not be used in the evaluation process.

Prices shall include all labour, materials, photocopies, telephone charges, overhead, profit, travel, and all other costs associated with providing the Services outlined in the SOW.

**e.g. only** (add rows as required)

Design and Development				
Item	Resource Role	All-Inclusive Per Diem rate	Estimated Days	Extended Price
1				
2				

3				
	Total:			

**e.g. only** (add rows as required)

<b>Maintenance and Support</b>			
Item	Resource Role	All-Inclusive Per Diem rate	One (1) Year Price
1			
2			
3			
	Total:		

**c.** The Proponent shall propose an invoicing schedule.

**d.** If there are any changes to a clause(s) found in Annex **A** that the Proponent would like to put forth (reference Annex **A** and section **5.9**), include the suggested change(s) as part of the financial proposal.

#### **4.6.3 Non-Resident of Canada**

Any Proponent who is a non-resident of Canada for tax purposes shall clearly state this fact in its financial proposal; otherwise, the Proponent will be deemed to have represented and warranted that it is a resident of Canada for tax purposes (reference section A4. Tax Implications in Annex **A**).

#### **4.6.4 Mathematical Errors**

If there are errors in the mathematical extension of unit price items, the unit prices prevail and the unit price extension is adjusted accordingly.

If there are errors in the addition of lump sum prices or unit price extensions, the total is corrected, and the correct amount reflected in the total price.

Any Proponent affected by mathematical errors shall be notified by IDRC and be given the corrected prices.

## SECTION 5 – CONDITIONS

The purpose of this section is to inform the Proponent about IDRC's procedures and rules pertaining to the RFP process.

### 5.1 ENQUIRIES (M)

All matters pertaining to this RFP are to be referred exclusively to the Contracting Authority named on page 1.

No verbal enquiries or verbal requests for clarifications will be accepted.

Proponents should, as much as feasible, aggregate enquiries and requests for clarifications and shall submit them **in writing via email** to the **Contracting Authority as early as possible and before the close date** in order to receive a response prior to the close date. **IDRC cannot guarantee a reply to enquiries received less than five (5) calendar days prior to the closing date.** When submitting, Proponents *email subject line* should cite "**RFP # 15160014, IDRC Public Website**".

The Contracting Authority will provide **all answers to significant enquiries** on buyandsell.gc.ca without revealing the sources of the enquiries.

In the event that it becomes necessary to revise any part of the RFP as a result of any enquiry or for any other reason, **an Amendment** to this RFP will be issued and posted on buyandsell.gc.ca

**Important note:** Proponents must download all RFP documents directly from the Buy and Sell website. IDRC will not distribute RFP documents that are posted on buyandsell.gc.ca

### 5.2 SUBMISSION DEADLINE (M)

IDRC will only accept proposals up the close date and time indicated on page 1.

**Important note:** Late proposals will not be accepted. No adjustments to proposals will be considered after the close date and time.

### 5.3 PROPOSAL SUBMISSION INSTRUCTIONS (M)

Proposals should be submitted in accordance with the instructions in this section.

#### 5.3.1 Method of Sending

The preferred method of proposal submission is electronic, via **email**, in **Microsoft Word** or in **PDF** format to the Contracting Authority named on page 1. Proponents *email subject line* should cite "**RFP # 15160014, IDRC Public Website**" when submitting via email.

**Important Note:** Email messages with large attachments can be slowed down in servers between the Proponent's email and the Contracting Authority's email inbox. It is the Proponent's responsibility to ensure that large emails are sent sufficiently in advance to be at IDRC by the close date and time. Proponents should use electronic receipt confirmation and or contact the Contracting Authority to confirm receipt.

**Important Note:** The maximum size of an email that IDRC can receive is 10MB. If necessary, Proponents can send multiple emails.

### 5.3.2 Number of Copies

Electronic submission should consist of **two (2) files**: one (1) for the cover letter and technical proposal and one (1) for the financial proposal.

### 5.3.3 Changes to Submission

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

## 5.4 VALIDITY OF PROPOSAL (M)

Proposals **MUST** remain open for acceptance for **ninety (90) days** after the close date.

## 5.5 PROPONENTS COSTS

All costs and expenses incurred by a Proponent in any way related to the Proponent’s response to the RFP, including but not limited to any clarifications, interviews, presentations, subsequent proposals, review, selection or delays related thereto or occurring during the RFP process, are the sole responsibility of the Proponent and will not be chargeable in any way to IDRC.

## 5.6 GOVERNING LAWS

This RFP is issued pursuant to the laws of the province of Ontario and the laws of Canada.

## 5.7 CONFLICT OF INTEREST (M)

In submitting a Proposal, the Proponent **MUST** avoid any real, apparent or potential conflict of interest and will declare to IDRC any such conflict of interest.

In the event that any real, apparent, or potential conflict of interest cannot be resolved to the satisfaction of IDRC, IDRC will have the right to immediately reject the Proponent from consideration and, if applicable, terminate any Contract entered into pursuant to this RFP.

## 5.8 RIGHTS OF IDRC

IDRC does not bind itself to accept any proposal submitted in response to this RFP, and may proceed as it, in its sole discretion, determines following receipt of proposals. IDRC reserves the right to accept any proposal(s) in whole or in part, or to discuss with any Proponents, different or additional terms to those envisioned in this RFP or in such a Proponent’s proposal.

After selection of preferred proposal(s), if any, IDRC has the right to negotiate with the preferred Proponent(s) and, as a part of that process, to negotiate changes, amendments or modifications to the proposal(s) at the exclusion of other Proponents.

Without limiting the foregoing, IDRC reserves the right to:



- a) seek clarification or verify any or all information provided by the Proponent with respect to this RFP, including, if applicable to this RFP, contacting the named reference contacts;
- b) modify, amend or revise any provision of the RFP or issue any addenda at any time; any modifications, amendment, revision or addendum will, however, be issued in writing and provided to all Proponents;
- c) reject or accept any or all proposals, in whole or in part, without prior negotiation;
- d) reject any proposal based on real or potential conflict of interest;
- e) if only one proposal is received, elect to accept or reject it;
- f) in its sole discretion, cancel the RFP process at any time, without award, noting that the lowest or any proposal will not necessarily be accepted;
- g) negotiate resulting Contract terms and conditions;
- h) cancel and/or re-issue the RFP at any time, without any liability whatsoever to any Proponent;
- i) award all or any part of the work to one or more Proponents based on quality, services, and price and any other selection criteria indicated herein; and
- j) retain all proposals submitted in response to this RFP.

## **5.9 PROPOSED CONTRACT**

### **5.9.1 Resulting Contract**

Annex A has been provided as part of the RFP documents so that Proponents may review and become familiar with certain specific conditions that are expected to be adhered to in connection with the provision of services. While some of the language may be negotiated between IDRC and the successful Proponent, IDRC's flexibility to amend its standard terms and conditions may be limited.

**Important note:** The Proponent should outline any objections with reasons to any terms and conditions contained in this RFP and include them in its proposal. Failure to identify objections at the proposal stage may preclude Proponents from raising these objections in the course of any future negotiations.

### **5.9.2 Income Tax Reporting Requirement**

As a Crown Corporation, IDRC is obligated under the Canadian Income Tax Act and Regulations to report payments made by IDRC to suppliers. IDRC must therefore obtain the necessary information from suppliers and will request from the Lead Proponent to complete and sign the appropriate form(s) prior to execution of any Contract.

## ANNEX A – RESULTING CONTRACT TERMS AND CONDITIONS

### A1. Definitions

For the purposes of this Contract:

*Commencement Date* shall mean the date on which the services described in the Contract are to commence.

*Confidential Information* shall mean any and all technical and non-technical information including patent, copyright, trade secret, and proprietary information, techniques, sketches, drawings, models, inventions, know-how, processes, apparatus, equipment, algorithms, software programs, software source documents, source codes, and formulae related to the current, future, and proposed products and services of the Centre, and includes, without limitation, the Centre's information concerning research, experimental work, development, design details and specifications, engineering, financial information, procurement requirements, purchasing, manufacturing, and marketing plans and information.

*Consultant* shall mean either the individual, institution, corporation or partnership retained pursuant to this Contract, and its employees, directors, officers, partners, sub-Contractors and agents, as applicable, and any other representative for whom the Consultant is responsible at law.

*Day* shall mean eight hours of work when working in the city or country of the Consultant's principal place of business and ten hours when working in a city or country away from the Consultant's principal place of business.

*Termination Date* shall mean the earlier of **(a)** the date on which the final contract outputs described in the Payments section of this Contract have been delivered, and **(b)** the date on which the Contract automatically terminates by operation of the Termination provisions contained in this Contract.

### A2. Entire Contract

This Contract supersedes all previous Contracts and correspondence, oral or written, between the Centre and the Consultant, and represents the whole and entire understanding between the parties.

### A3. Conditions Precedent and Terms of Payment

The following sets out the conditions precedent that the Consultant must comply with to ensure payment for services pursuant to this Contract:

- a) Completion and delivery of the information requested in the **Supplier, Tax and Bank Information form** appended to this Contract.
- b) Satisfactory delivery of all Contract outputs, as per the **Terms of Reference and Schedule section** of this Contract.
- c) Proper completion of invoice(s) to set out:
  - Centre Contract number contained in the subject header of the Contract;
  - Invoice number;
  - Invoice Date;
  - Fees (daily rate and number of days or unit rate and number of units or fixed price);

- Detailed expenses as stipulated in the **Expenses section** of the Contract;
- GST (Goods and Services Tax) or HST (Harmonized Sales Tax), as applicable –Consultants not registered for Canadian GST purposes must itemize the taxes they paid; and
- GST/HST registration number, if applicable.

Subject to the terms set out in the **Payment section** of this Contract and the above conditions being met, the Centre will issue payment of fees and expenses according to the Centre’s standard payment period **of thirty (30) calendar days**. *The payment period is measured from: the date the Centre receives the duly completed Supplier, Tax and Bank Information form, or the date the Centre receives an acceptable invoice, or the date the work is delivered in acceptable condition as required in the Contract, whichever is latest.* If the content of the invoice or the requisite form is incomplete or the work is not acceptable, the Consultant will be notified and the payment period will be deferred until all deficiencies have been rectified to the Centre’s satisfaction.

The Centre will reimburse the Consultant for any applicable GST or HST, only if the fees and expenses on which taxes are claimed are net of any input tax credit the Consultant is entitled to claim from Canada Revenue Agency.

Notwithstanding the above, if the Centre provided an advance to the Consultant for expenses, such advance must be deducted from subsequent invoice totals. If the amounts advanced are found to exceed the final invoice total, the Consultant must refund the balance to the Centre upon submitting the final invoice, which must be no later than thirty (30) calendar days following the Termination Date.

The Centre will not pay more than one day of fees per 24-hour period. The Centre will not pay any fee nor any expenses incurred after the termination date of the contract.

Following the Termination Date, and payment of the final invoices, all taxes due and owing in relation to the provision of services pursuant to this Contract are deemed to have been paid by the Centre. The Consultant will be liable for any tax claims, debts, actions or demands in relation to the services provided pursuant to this Contract (hereinafter referred to as “Tax Claims”) and the Consultant shall indemnify and hold the Centre harmless against said Tax Claims.

#### **A4. Tax Implications**

The Canada Revenue Agency (CRA) is responsible for the administration of the GST or HST and income tax regulations. Contact CRA to discuss questions, concerns or obtain current regulations especially with respect to refunds or credits. The main CRA website can be found at <http://www.cra-arc.gc.ca>.

##### **a) Non-Resident Consultants**

Notwithstanding anything to the contrary in this Contract, the Centre will ***withhold 15% of fees and non-exempt expenses of non-resident Consultants working in Canada*** unless they hold a contract- specific waiver from the CRA. The Centre will transmit the funds withheld to CRA, in accordance with the income tax regulations of Canada. Such funds can be reclaimed by the consultant from the CRA or from their own governments as the case may be.

##### **b) Consultants Hired by a Centre Regional Office working in the country where the Regional Office is located**

Regional offices of the Centre issuing Contracts will apply the national fiscal regulations relevant to the hiring of local Consultants.

**A5. Air Travel Policy (if travel is applicable to the Contract)**

The Centre's policy is that all air travel be prepaid. All Contract personnel must travel economy class by the most direct and economical routing (taking advantage where possible of excursion fares). The Consultant is free to reroute or upgrade, where possible, at his or her own expense and settle any additional cost directly with the travel agency or airline.

Consultants will receive their ticket(s) via electronic ticketing.

Under no circumstances will the Centre entertain the Consultant making his or her own reservations and billing the Centre.

**A6. Confidentiality of Information****a) Non-Disclosure and Non-Use of Confidential Information**

The Consultant agrees that it will not, without authority, make use of, disseminate or in any way disclose any Confidential Information to any person, firm or business.

The Consultant shall take all reasonable precautions at all times (and in any event, efforts that are no less than those used to protect its own confidential information) to protect Confidential Information from disclosure, unauthorized use, dissemination or publication, except as expressly authorized by this Contract.

The Consultant agrees that it, he, or she shall disclose Confidential Information only to those of its, his, or her employees or subcontractors who need to know such information and certifies that such employees or subcontractors have previously agreed, either as a condition to employment or service or in order to obtain the Confidential Information, to be bound by terms and conditions substantially similar to those of this Contract.

The Consultant will immediately give notice to the Centre of any unauthorized use or disclosure of the Confidential Information. The Consultant agrees to indemnify the Centre for all damages, costs, claims, actions and expenses (including court costs and reasonable legal fees) incurred by the Centre as a result of the Consultant's failure to comply with its obligations under this section, and the Consultant further agrees to defend and participate in the defence of any claim or suit alleging that the Centre has a liability with respect to any confidential information it may have acquired from a third party; with regard to any unauthorized disclosure, provision or making available of any such Confidential Information.

**b) Exclusions from Nondisclosure and Non-use Obligations**

The Consultant's obligations under the preceding subsection (A6.a) with respect to any portion of the Confidential Information shall terminate when the Consultant can document that:

- i. it was in the public domain at or subsequent to the time it was communicated to the Consultant by the Centre through no fault of the Consultant;
- ii. it was rightfully in the Consultant's possession free of any obligation of confidence at or subsequent to the time it was communicated to Consultant by the Centre; or
- iii. it was developed by the Consultant, its employees or agents independently of and without reference to any information communicated to the Consultant by the Centre.

A disclosure of Confidential Information (a) in response to a valid order by a court or other governmental body, (b) otherwise required by law, or (c) necessary to establish the rights of either party under this Contract, shall not be considered to be a breach of this Contract or a waiver of confidentiality for other purposes; provided, however, that the Consultant shall provide prompt written notice thereof to enable the Centre to seek a protective order or otherwise prevent such disclosure.

**c) Ownership of Confidential Information and Other Materials**

All Confidential Information and any Derivatives thereof, whether created by the Centre or the Consultant, remain the property of the Centre and no license or other rights to Confidential Information is granted or hereby implied.

For purposes of this Contract, "Derivatives" shall mean:

- i. for copyrightable or copyrighted material, any translation, abridgement, revision, or other form in which an existing work may be recast, transformed, or adapted;
- ii. for patentable or patented material, any improvement thereon; and
- iii. for material which is protected by trade secret, any new material derived from such existing trade secret material, including new material which may be protected by copyright, patent, and/or trade secret.

The Consultant shall, on request, promptly return to the Centre all of its proprietary materials together with any copies thereof.

This section shall survive the termination of this Contract.

**A7. Use of Centre Property**

**a) Access to Information Systems and Electronic Communication Networks**

During the course of this Contract, the Consultant may be provided with access to Centre information systems and electronic communication networks. The Consultant, on behalf of its/his/her employees, sub-Contractors and representatives, agrees to abide by Centre policies concerning use of such information systems and networks. The Centre will provide the Consultant with any such policies upon commencement of services pursuant to this Contract, or as such policies are put into effect, and the Consultant will make such policies known to its personnel, and will take such steps as are necessary to ensure compliance with such policies.

**b) Access to Centre Premises**

The parties agree that reasonable access to the Centre's premises by Consultant's authorized personnel and which is necessary for the performance of the services hereunder, in accordance with the terms of this contract, shall be permitted during normal business hours of the Centre. The Consultant agrees to observe all Centre security requirements and measures in effect at the Centre's premises to which access is granted by this agreement.

**A8. Relationship with the Centre**

Nothing in this Agreement shall be deemed in any way or for any purpose to constitute the parties hereto partners in the conduct of any business or otherwise. The Consultant shall have no authority

to assume or create any obligation whatsoever, expressed or implied, in the name of the Centre, or to bind the Centre in any manner whatsoever.

The Consultant acknowledges and agrees that, in carrying out this Contract, the Consultant is acting as an independent contractor and not as an employee of the Centre. The Contractor shall be responsible for all matters related to it or its employees, as the case may be, including but not limited to deducting or remitting income tax, Canada Pension Plan contributions, Employer Insurance contributions or any other similar deductions required to be made by law for employees, The Consultant agrees to indemnify the Centre in respect of any such remittances which may be subsequently required by the relevant authorities, together with any related interest or penalties which the Centre may be required to pay.

The Consultant is free to provide its services to others during the course of this Contract, provided however, the Consultant fully respects the commitments made to the Centre pursuant to this Contract, including all completion dates and deadlines for tasks and deliverables as may be indicated in the **Terms of Reference** and **Schedule sections** of the contract.

### **A9. Quality of Work**

The consultant covenants that it will provide its services pursuant to this agreement in a diligent and workmanlike manner, with regard to the best interests of the Centre, and warrants that its personnel possess the skill and experience necessary to the satisfactory performance of the work contracted for.

### **A10. Assignment of Copyright and Waiver of Moral Rights**

In consideration of the fees paid, the Consultant, its employees, sub-Contractors, successors and assignees expressly agree to assign to the Centre any copyright arising from the works (including audio- visual material, software, documents, books, pamphlets, memoranda or reports, including translations) the Consultant produces while executing this Contract. The Consultant hereby agrees to waive in favour of the Centre any moral rights in the works. The Consultant shall secure any additional waivers of moral rights in the works in favour of the Centre, from personnel and sub-contractors, as appropriate.

Furthermore, the Consultant may not use, reproduce or otherwise disseminate or authorize others to use, reproduce or disseminate such works without the prior written consent of the Centre.

### **A11. Patent, Trade Mark, Trade Secret and Copyright Infringement**

The Consultant covenants that no services or materials to be provided to the Centre under this agreement will infringe upon or violate the rights of any third parties, including such parties' intellectual property rights. Without limiting the generality of the foregoing, the Consultant represents and warrants that no services or materials provided pursuant to this agreement will infringe any existing patent, trade mark, trade secret or copyright registered or recognized in Canada or elsewhere, with respect to or in connection with the intended use of the services or materials by the Centre.

The Consultant agrees to indemnify and hold the Centre harmless from and against any and all damages, costs, and expenses (including court costs and reasonable legal fees) incurred by the Centre as a result of the infringement or alleged infringement of any third party intellectual property rights, and further agrees to defend and participate in the defence of any claim or suit alleging that the Centre has a liability in this regard.

This section will survive termination of the contract.

### **A12. Sub-Contractors, Successors and Assignees**

The Consultant is prohibited from entering into any sub-contract, designating any successor or assigning any rights under this Contract without the express written consent of the Centre.

### **A13. Conflict of Interest**

The Consultant must avoid participating in activities or being in situations that place it, him, or her, in a real, potential or apparent conflict of interest that has the potential of influencing the contract outputs being contemplated by this Contract.

The Consultants must not accept, directly or indirectly, for themselves or on behalf of any person or organization with whom they are in a close social, family or economic relationship, any gift, hospitality, or other benefit from any person, group, or organization having dealings with the Centre where such gift, hospitality, or other benefit could reasonably foreseeably influence the Consultant in the exercise of its, his or her official duties and responsibilities pursuant to this Contract.

### **A14. Insurance**

The Consultant is responsible for taking out at its own expense any insurance (business, travel, hospitalization, medical, trip cancellation or other) deemed necessary while executing this Contract.

### **A15. National Legislation**

In performing services under this Contract, the Consultant shall be responsible for complying with all legislation of the country (countries) in which it, he, or she must work (including but not limited to laws pertaining to immigration, taxation, customs, employment and foreign exchange control).

It is the individual's responsibility to comply with the travel visa regulations of any country visited or in transit.

The overhead (included in fees) and allowances paid under this Contract include provision for complying with national legislation of the countries the Consultant may visit (including Canada). The Centre will not entertain any claim for work visas, work permits, etc., or any other costs relating to compliance with the national legislation of any country in the world.

### **A16. Severability**

The provisions of this Contract are severable and the invalidity or ineffectiveness of any part shall not affect or impair the validity and effectiveness of remaining parts or provisions of this Contract.

### **A17. Interpretation of the Contract**

This Contract shall be governed and construed in accordance with the laws of the Province of Ontario, Canada. Where a dispute cannot be resolved by mutual agreement, the parties agree that any legal action or claim must be brought before the courts of the Province of Ontario, Canada, which will have exclusive jurisdiction over all such actions and claims.

### **A18. Non-Waiver**

Failure by a party to enforce any right or to exercise any election provided for in this Contract shall not be considered a waiver of such right or election. The exercise of any right or election of this Contract shall not preclude or prejudice a party from exercising that or any other right or election in future.

### **A19. Notices**

Any notices, requests, demands or other communication relating to this Contract shall be in writing and may be given by:

- a) hand delivery;
- b) commercial courier;
- c) facsimile;
- d) registered mail, postage prepaid; or
- e) email.

Any notice so sent shall be deemed received as follows:

- a) if hand delivered, on delivery;
- b) if by commercial courier, on delivery;
- c) if by registered mail, three (3) business days after so mailing;
- d) if by facsimile, upon receipt. The initial address and facsimile number for notice are set out in this Contract and may be changed by notice hereunder; and
- e) if email, on delivery.

### **A20. Language**

The parties have requested that this Contract and all notices or other communications relating thereto be drawn up in English. Les parties ont exigé que ce contrat ainsi que tous les avis et toutes autres communications qui lui sont relatifs soient rédigés en anglais.

### **A21. Force Majeure**

The Consultant may interrupt any service by notice to the Centre if prevented from providing the service by reason of strikes, lockout or other labour disputes (whether or not involving the Consultant's employees), floods, riots, fires, acts of war or terrorism, explosions, travel advisories or any other cause, whether or not a superior force, beyond Consultant's reasonable control. During any such interruption, the Centre shall not be obliged to pay the rates associated with such interruption of service and may terminate this Contract as upon providing 10 calendar days' written notice or as otherwise contemplated by the Contract.

### **A22. Termination**

This Contract may be terminated in its entirety or in part by the Centre for any reason whatsoever without any further obligation to the Centre upon **providing at least ten (10) working days' advance written notice.**



In addition, this Contract shall immediately terminate without notice if the Consultant:

- a) ceases to carry on business;
- b) commits an act of bankruptcy within the meaning of the Bankruptcy and Insolvency Act (Bankruptcy and Insolvency Act, R.S., 1985, c. B-3) or is deemed insolvent within the meaning of the Winding-up and Restructuring Act (Winding-up and Restructuring Act, R.S., 1985, c. W-11) or makes an assignment, against whom a receiving order has been made under the applicable bankruptcy legislation or in respect of whom a receiver, monitor, receiver-manager or the like is appointed; or
- c) becomes insolvent or makes an application to a court for relief under the Companies' Creditors Arrangement Act, the Bankruptcy and Insolvency Act or the Winding Up and Restructuring Act (Companies' Creditors Arrangement Act, R.S., c. C-25) or comparable local legislation.

### **A23. Centre Review and Audit**

The Consultant agrees, if the Centre so requests at any time up to two years following the Termination date to:

- a) submit a complete financial accounting of expenses, supported by original (or certified copies of) invoices, timesheets or other documents verifying the transactions (excluding any receipts which have been submitted at the time of invoicing as deemed necessary according to the terms of the Contract); and
- b) give officers or representatives of the Centre reasonable access to all financial records relating to the work to permit the Centre to audit the use of its funds. This shall include books of account, banking records and, in the case of individuals, credit card statements.

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## ANNEX B – MANDATORY (M) REQUIREMENTS CHECKLIST

As stated in **Section 3.2.1 Mandatory Requirements**, to qualify as an eligible Proponent, you **MUST** meet all the following requirements.

**IMPORTANT NOTE:**

The Proponent **MUST provide the location in their proposal of the detailed information relative to each mandatory requirement**. Simply stating “compliant” is not enough for IDRC to “pass” a Proponent on a mandatory requirement (**reference Section 4.5.2 Response to the SOW**).

**IMPORTANT NOTE:**

**All fee implications related to the responses MUST be identified in the financial proposal.**

Item	Requirements	Rating	Proposal Section
M1	<p><b>Executive Summary</b></p> <p>The Proponent shall include a <b>short executive summary</b> highlighting the following:</p> <ol style="list-style-type: none"> <li>a. a <b>description of the company</b> outlining: <ol style="list-style-type: none"> <li>i. the Proponent’s business and specializations</li> <li>ii. the location of its head office and other offices (specify city and province only)</li> <li>iii. the total number of years the Proponent has been in business</li> <li>iv. the number of full-time employees</li> <li>v. details of any sub-contracting arrangements to be proposed</li> </ol> </li> <li>b. a brief summary of what makes the Proponent’s organization <b>stand out from its competitors</b>.</li> </ol>	M	
M2	<p><b>Company Summary - Project Experience</b></p> <p>The Proponent must <b>demonstrate that it has experience</b> with similar website CMS and redesign projects with the Government of Canada and or Canadian Crown organizations in the past five (5) years (<i>to a maximum of six (6) projects</i>).</p>	M	
M3	<p><b>Company Summary - Client References</b></p> <p>The Proponent shall provide:</p> <p>two (2) client references for whom similar services have been done within the past two (2) years from the RFP closing date. This shall include: company name, client contact name, contact title, contact telephone number, email address, services period, and brief description of services provided. <i>Note: DRC reserves the right to</i></p>	M	

	contact these references. IDRC cannot be used as a reference towards this RFP.		
<b>M4</b>	<p><b>Understanding of IDRC and Project Requirements</b></p> <p>The Proponent shall demonstrate that it has a <b>complete understanding</b> of:</p> <ol style="list-style-type: none"> <li>IDRC; and</li> <li>the objectives and requirements in Statement of Work</li> </ol>	<b>M</b>	
<b>M5</b>	<p><b>Proposed CMS solution</b></p> <p>The Proponent shall demonstrate that the proposed CMS solution answers to each of the required <b>FEATURES</b> stated in the SOW and found below in <b>M5.1</b>, <b>M5.2</b>, and <b>M5.3</b>. <i>Be sure to address each bullet.</i></p> <p>As well, the Proponent shall describe any other <b>FEATURES</b> as noted in <b>M5.4</b> below.</p>	<b>M</b>	
<b>M5.1</b>	<p><b>Performance</b></p> <ul style="list-style-type: none"> <li><b>Low bandwidth:</b> many stakeholders have limited Internet bandwidth. The website must perform with minimal resource requirements.</li> <li><b>Caching:</b> ability to maximize performance using caching or a “dynamic to static” solution.</li> <li><b>Search:</b> search feature should provide the ability to filter results, auto complete, shows results progressively, look ahead (show size/scope of results).</li> <li><b>Responsive design:</b> recognizing the user’s device accessing the site and serves up the relevant content to “fit” the device. (desktop, mobile, tablets, ...)</li> </ul>	<b>Part of M5</b>	
<b>M5.2</b>	<p><b>Content</b></p> <ul style="list-style-type: none"> <li><b>Search Engine Optimization:</b> supports user friendly/search engine friendly URLs, customize Page title, meta description, meta keyword, taxonomy, supports canonical tags and allows for automatic creation of XML site maps.</li> <li><b>Access control:</b> distinct roles and workflows with varying levels of access and control based on assigned roles.</li> <li><b>Workflow management:</b> easy to create and manage workflows, support for translation, ability to apply workflow to all page templates. It should include an automated publishing feature to schedule content for</li> </ul>	<b>Part of M5</b>	

	<p>publishing. Content must be traceable throughout the review and publishing process.</p> <ul style="list-style-type: none"> <li>• <b>Content creation and editing:</b> easy to create content templates/forms.</li> <li>• <b>Content management:</b> allows for managing content lifecycle, scheduled content publishing with automatic removal and/or archiving, review by dates, versioning.</li> <li>• <b>Content preview:</b> prior to publishing.</li> <li>• <b>Automated templates:</b> create standard output templates (usually HTML and XML) that can be automatically applied to new and existing content.</li> <li>• <b>Embedded content:</b> allows for embedding content in a variety of formats associated with images, video, audio, and interactive features.</li> <li>• <b>Upload content:</b> Ability to restrict file types. Ability to add file size restrictions.</li> <li>• <b>Easily editable content:</b> WYSIWYG text editor should be able to integrate template styles for easy authoring; can switch between WYSIWYG and HTML; and provide an integrated image editing (smart resizing, cropping, image properties, effect filters, format conversion).</li> </ul>		
M5.3	<p><b>Structure</b></p> <ul style="list-style-type: none"> <li>• <b>Accessibility:</b> is fully compliant with WCAG 2.0 standards.</li> <li>• <b>Web standard upgrades:</b> Automatically receives regular notifications about updates and new feature sets.</li> <li>• <b>Site metrics</b> ability to integrate with Google analytics</li> <li>• <b>Scalable/ extensible feature sets:</b> integrate widgets and third-party plug-ins to extend site features (e.g. Google maps API, photo gallery/slideshows).</li> <li>• <b>Metadata:</b> easy to use metadata management and content tagging tools based on defined keywords/metadata of web pages and individual content objects. Will need to also synchronize with IDRC Enterprise Metadata Repository. (see Annex D)</li> <li>• <b>Social media integration:</b> Twitter feeds and other RSS feeds, share buttons, follow buttons, etc.</li> <li>• <b>Content syndication:</b> RSS feeds/web part for automated sharing, may also e-mail users when updates are available as part of the workflow process.</li> </ul>	Part of M5	

	<ul style="list-style-type: none"> <li>• <b>Multilingual:</b> interface and toolsets for a minimum of three (3) languages: English, French and Spanish with the capability of adding more such as Arabic.</li> <li>• <b>Navigation:</b> allows for dropdown menus, megamenu, site maps and breadcrumbs.</li> <li>• <b>Databases:</b> must be able to integrate data from other databases, including legacy databases.</li> <li>• <b>User Management:</b> must be able to sync <a href="#">with Active Directory Federated Services (ADFS)</a></li> <li>• <b>Archival:</b> The ability to export the content/pages offsite for archival purposes.</li> </ul>		
M5.4	<p>Describe any <b>additional functionality/features</b> the proposed CMS solution has.</p> <p>Additionally, the SOW lists the following “nice to haves”. <b>Address any features listed below</b> that the proposed CMS solution has:</p> <p><b>Nice to have features</b></p> <ul style="list-style-type: none"> <li>• Advanced SEO tools.</li> <li>• Blogging capabilities.</li> <li>• Integration with Digital Asset Management (DAM).</li> <li>• Ability to create clean permalink structure (for content moved from active pages to archive).</li> <li>• Automatic link validation.</li> <li>• Personalization based on audience group.</li> <li>• Incorporates A B and or multivariate testing methods.</li> <li>• Ability to activate or hide content modules/knowledge objects.</li> <li>• Version control/comparison and recovery of content.</li> <li>• Advanced (configurable) custom WYSIWYG editor elements (e.g. table and div).</li> <li>• Polling, user-generated content (comments reviews, rating).</li> <li>• Wikis, discussions groups (moderated and open).</li> <li>• Ability to create microsites/web portals or expand implementation across multiple domains.</li> </ul>	Part of M5	

<b>M6</b>	<b>Considerations for Software as a Service (SaaS) / cloud solution:</b> <i>If the proposed CMS solution is a Software as a Service (SaaS) / cloud solution, the Proponent must provide detailed information on the following:</i> <ul style="list-style-type: none"><li>• Details about where the content is hosted (e.g. US, Canada, etc.).</li><li>• Ability to export the content out to local servers.</li><li>• Details on backup capabilities.</li><li>• Details on how to recover for disaster.</li><li>• Details about monitoring and notification process on hacking / breach activities.</li></ul>	<b>M</b>	
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## ANNEX C – RATED (R) REQUIREMENTS CHECKLIST

As stated in **Section 3.2.2 Rated Requirements**, the following requirements will be evaluated according to the degree to which they meet or exceed IDRC's requirements.

**IMPORTANT NOTE:**

The Proponent **MUST provide the location in their proposal of the detailed information relative to each requirement (reference Section 4.5.2 Response to the SOW).**

**IMPORTANT NOTE:**

All fee implications related to the responses **MUST** be identified in the financial proposal.

Item	Requirements	Rating	Proposal Section
R1	<p><b>Methodology/Approach/Schedule</b></p> <p>The Proponent should include information in their response such as but not limited to:</p> <ul style="list-style-type: none"> <li>a. the solution, approach, or methodology, in response to the Statement of Work, including the proposed project management plan complies with the requirements and illustrates a viable solution to the following requirements:               <ul style="list-style-type: none"> <li>i. Analyze and recommend the best option(s) for hosting the idrc.ca website</li> <li>ii. Recommend and implement a Content Management System (CMS)</li> <li>iii. Design &amp; Development</li> <li>iv. Migration</li> <li>v. Testing</li> <li>vi. Documentation and training</li> <li>vii. Maintenance and support</li> </ul> </li> <li>b. illustrates a clear project management process and approach from initiation to completion</li> <li>c. specifies key deliverables based on the requirements</li> <li>d. provides acceptable and realistic performance measurement and a quality control and assurance process</li> <li>e. provides a clear and detailed delivery schedule with preliminary / intermediate and primary deliverables and milestones</li> <li>f. illustrates risk management planning knowledge and capabilities including change management (scope) management and problem-solving techniques</li> </ul>	R	

<b>R2</b>	<p><b>Project Experience</b></p> <p>3-5 projects with similar size and scope to IDRC's website in the last 3 years. These shall include: brief description, timeline, budget.</p> <ul style="list-style-type: none"> <li>• 0-2 projects: 0 points</li> <li>• 3 projects: 5 points</li> <li>• 4 projects: 8 points</li> <li>• 5 projects: 10 points</li> </ul>	<b>R</b>	
<b>R4</b>	<p><b>CMS Experience</b></p> <p>Two (2) projects with proposed CMS in the last three (3) years. These shall include: brief description, timeline, budget.</p>	<b>R</b>	
<b>R5</b>	<p><b>Proposed Resources</b></p> <p><b>Outline all proposed resources (“delivery of services personnel” and other resources) to be used in providing the services and include:</b></p> <ol style="list-style-type: none"> <li>a. name, title, telephone #, email address, location (city and province only)</li> <li>b. their roles, structure and reporting relationships</li> <li>c. maximum two-page up-to-date bio of each proposed resource that includes relevant work experience, education, and all relative professional designations and certifications</li> </ol> <p>Should the Proponent at any time be unable to provide the services of the resources named in a resulting Contract, the Proponent shall be responsible for providing replacement personnel at the same cost who shall be of similar or greater ability and attainment and whom shall be acceptable to the IDRC Project Authority.</p>	<b>R</b>	



## **ANNEX D – ADDITIONAL INFORMATION**

In this Annex is found the following reference document:

1. **IDRC Information Architecture and User Experience Design document** [This document describes IDRC's web User Experience (UX) and its related Information Architecture (IA)]

Annex **D** has been posted to [buyandsell.gc.ca](http://buyandsell.gc.ca) as a separate document for retrieval by Proponents.

## ANNEX E – SCENARIOS FOR SHORTLISTED PROPONENTS

As part of the Proponent selection process, each shortlisted Proponent will be required to **a) prepare a custom presentation of their proposed CMS solution** that incorporates the current IDRC.ca look and feel and follows the scenarios outlined below, and **b) have their key proposed resources** participate in the presentation.

- **Scenario One:** Content creation, publishing and archiving
  - a. Creation
    - i. Text
    - ii. Image (thumbnail and original)
    - iii. Video
  - b. What you see is what you get (WYSIWYG) editor
  - c. Show how to assign roles and set permissions
  - d. Show how to set or trigger a publishing and approval Workflow.
  - e. Scheduling publication
- **Scenario Two:** Template creation and selection
  - a. Show end user selecting and modifying a template
  - b. Illustrate how a non-technical user can create a new template based on an existing template
  - c. Illustrate how a new template can be created
- **Scenario Three:** Mobile access
  - a. Show the same site on desktop, tablet and mobile devices
  - b. Explain how rendering decisions are made
- **Scenario Four:** Multilingual
  - a. Show how English and French content can be published simultaneously
  - b. Demonstrate how a third language can be published on an ad hoc basis
  - c. Explain how changes are tracked
- **Scenario Five:** Search, RSS and metadata capabilities:
  - a. Demonstrate search and explain why it is effective
  - b. Illustrate how RSS feeds are created
  - c. Explain and illustrate how metadata/taxonomy is managed and used
- **Scenario Six:** Project lifecycle - walk through a typical project plan for deploying the new site.  
Be sure to cover:
  - a. Infrastructure planning
  - b. Integration planning
  - c. Content management approaches
  - d. How the IDRC team will be involved
  - e. How knowledge will be transferred from vendor to internal team