



IDRC | CRDI

International Development Research Centre
Centre de recherches pour le développement international

REQUEST FOR SUPPLIER QUALIFICATION (RFSQ)

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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 RFSQ.

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

1.2 PURPOSE OF THIS RFSQ

IDRC requests proposals from prospective respondents to qualify as a future potential supplier for the provision of Drupal Website Development and Maintenance Services, where requirements are described in section 2, the Terms of Reference (“Services”).

1.3 CONTRACT PROCESS

Respondents will be evaluated according to the criteria described in Section 3. Based on those criteria, certain respondents will be selected for inclusion on a prequalified supplier roster list and invited to negotiate a Master Agreement. The Master Agreement will establish the process for the provision of any subsequent Deliverables to the Centre pursuant to an invitational second-stage competitive process.

The term of the Master Agreement is to be for a period of three (3) years, with an option in favour of the Centre to extend the agreement on the same terms and conditions for two (2) additional terms of one (1) year each.

1.4 NO GUARANTEE OF VOLUME OF WORK OR EXCLUSIVITY OF CONTRACT

The Centre makes no guarantee of the value or volume of work to be assigned to the selected respondents. Any Agreement entered into pursuant to an invitational second-stage competitive process will not be an exclusive contract for the provision of the described Deliverables. The Centre may contract with others for the same or similar Deliverables to those described in this RFSQ or may obtain the same or similar Deliverables internally.

1.5 DOCUMENTS FOR THIS RFSQ

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

- This RFSQ document
- Annex A – Resulting Contract Terms and Conditions
- Annex B –Evaluation Reference Form (for Evaluators to Complete)
- Annex C – Mandatory Requirements Checklist
- Annex D – Reference Form (for Proponents to Complete)

- Annex E – NDA Form

1.6 TARGET DATES FOR THIS RFSQ

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

Event	Date
RFSQ issue date	See page 1
Deadline for Enquiries	See section 5.1
RFSQ close date	See page 1
Anticipated Evaluation, selection, and notification of Lead Proponents	February 9, 2017
Anticipated Interviews/Presentations by short-listed Proponent(s)	February 22, 2017
Anticipated Finalize Agreements with Roster Proponents	March 1, 2017

SECTION 2 – TERMS OF REFERENCE

2.1 INTRODUCTION

In May 2016, IDRC launched a new website built on Drupal's open-source content management system, and Microsoft's cloud-based hosting platform, Azure. To leverage these investments IDRC will build all future web properties within this ecosystem. While IDRC does have an internal team responsible for the development of its web properties, workload and/or technical complexity may require external resources. With this RFSQ, IDRC is seeking to establish a roster of prequalified Drupal specialized companies to compete for future website development and support/maintenance services on a when and as required basis.

2.2 BACKGROUND

Currently, IDRC hosts five (5) websites, either live or in development that are built on Drupal, for its own purpose or for the needs of its programs undertaken in co-operation with its partner funder organizations. These websites live or in production are:

- www.idrc.ca
- www.thinktankinitiative.org
- www.adaptationoptions.ca
- Collaborative Adaptation Research Initiative in Africa and Asia (CARIAA) - Under Construction
- Centre of Excellence for Civil Registration and Vital Statistics Systems - Under Construction, expected launch 2017

IDRC foresees the possible need to build affiliate websites to respond to its needs and those of the donor partners. To meet these needs in a timely manner, having a roster of prequalified suppliers will assist in reducing the Centre's time and resource requirements for evaluating suppliers detailed technical proposals on a project-by-project basis.

2.3 CURRENT IT STRUCTURE

2.3.1 The IDRC website infrastructure

2.3.1.1 Production infrastructure

- 2 web front end servers with 1 load balancer
- 1 database server
- 1 content distribution network

2.3.1.2 User acceptance testing infrastructure

- 2 web front end servers with 1 load balancer
- 1 database server
- 1 content distribution network

2.3.1.3 Quality assurance infrastructure

- 1 server for web front end and database roles

2.3.1.4 Development infrastructure

- Virtual local instance of the server generate and configured using Vagrant

2.3.1.5 Development pipeline

Local > QA > UAT > Production

The development pipeline include configuration management (CM) using Puppet and continuous integration (CI) using Jenkins.

2.3.2 System Integration

IDRC's web properties draw data from a possible number of external sources. Descriptions of those sources follows. Note, while much of the data of these systems is currently housed within the Drupal CMS, there may be occasion to update that content with data from the legacy systems. Those requirements will be clearly articulated in any future SOW for which approved vendors will be asked to quote on.

2.3.2.1 IDRC_INT

This is an MS-SQL database. 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 is currently exported into the public website Drupal system and displayed 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

2.3.2.2 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.

2.3.2.3 CRM

This is a MS-SQL database that is a temporary source for all project related content until it is replaced by a data warehouse.

2.3.2.4 Data Warehouse

The Data Warehouse will contain data from a variety of IDRC's information Management Systems and will be the main source of data for all other systems including the public website which display this data externally. The anticipated date for completion is March 31, 2017.

2.4 DELIVERABLES

2.4.1 Required Services.

1. **Design Services:** web application design services that adhere to IDRC's visual identity and branding protocols. This includes information architecture (structuring content, building display and organizing functionality), and graphical user interface design. All work must meet the Government of Canada's accessibility requirements, be fully responsive, in English and French, and tested across all major web browsers and screen sizes, as needed.
2. **Development, Configuration, Content Management and Integration Services:** development or configuration of new features using the required version of Drupal (7 or 8). New feature development in a minimum of two languages (French, English) with the possibility of other languages (i.e. Spanish, Arabic) on both the administrative back end and the public-facing front end. Multisite feature deployment, if a feature is applied to other existing site. Content management services related to responsively designed web based applications. Examples would include creation and modification of visual layouts for new content areas, new sites, etc. Custom software development if required and integration with legacy and other corporate information systems. (see systems integration for further details)
3. **ADFS deployment in Azure:**
IDRC uses Microsoft's cloud-based hosting solution, Azure. Proponents must be proficient in implementing single sign-on (SSO) capabilities, federated with Azure AD or O365 to enable users to authenticate using on-premises credentials to access cloud-based resources
4. **Maintenance:** tasks and duties related to site maintenance. For example, following Drupal best practices, and in coordination with the relevant IT resources, maintenance of multiple websites to upgrades are applied and custom modules are maintained.

2.4.2 Documentation and training:

Robust documentation and solid hand-over practices are key to ensuring that the capacity of IDRC's internal resources are enhanced and that ongoing maintenance is understood and routine. Proponents must demonstrate:

1. Robust quality control practices
2. Sound development and source code management practice (i.e version controls, inline documentation practices etc.)
3. A documentation and hand-off process that includes but not limited to:
 - a. developer training and thorough documentation on what was built or customized and the tools used to create the artifact ;
 - b. requirement gathering documentation;
 - c. architecture and design documentation;
 - d. technical documentation;
 - e. user documentation;
 - f. source code

2.4.3 Warranty and maintenance

Qualified proponents agree to provide a minimum 3-month warranty on all deliverables provided in accordance with the specifications described in the Terms of Reference/Statement

of Work without errors from the day they are operational in the production environment. Any bug or deficiencies found during this period will be fixed promptly at no additional cost.

2.5 METHODOLOGY

Proponents will be required to follow the methodology when designing/maintaining future requests for web services requirements as indicated below.

1. Requirement gathering. A discovery phase during which the awarded supplier will gather all necessary information to ensure they have a full understanding of the task(s) at hand.
2. Project execution. IDRC has adopted Agile methodology for all its website and application development. Proponents must demonstrate a thorough understanding of Agile. Over the course of any given project proponents will be expected to:
 - a. Lead and participate in regular daily scrums with the Centre.
 - b. Assess any potential risks and resolutions throughout the project lifecycle.
 - c. Provide weekly progress reports.
 - d. Provide monthly financial reports on each project.
 - e. From time to time face-to-face meetings will be required at the Centre's Ottawa location. Travel costs and expenses are not covered by the Centre.

2.6 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 Terms or Reference/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.

2.7 LOCATION OF WORK AND TRAVEL

It is expected that most of the work can take place at the Proponent's office location with the exception of regular meetings that are held at IDRC's Ottawa Headquarters 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.

2.8 LANGUAGE OF WORK

The Proponent acknowledges and understands that IDRC is governed by the Official Languages Act and agrees to take any measures necessary to ensure compliance with the Official Languages Act.

When providing internal services to IDRC employees, in person, over the phone, or in writing (including electronic correspondence), the Proponent must actively offer bilingual services in accordance with the Official Languages Act and indicate clearly by verbal and/or visual means that employees can communicate with and obtain available services in either English or French. The Proponent must also ensure that there is sufficient capacity to provide services that are comparable in terms of quality and timeliness in both official languages.

SECTION 3 – PROPOSAL EVALUATION

This section describes the process that IDRC will use to evaluate Proposals and select a roster of approved Proponents.

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 RFSQ. 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.

Any mandatory requirements associated with the Terms of Reference are clearly identified in Annex C.

A Mandatory Requirements Checklist, which summarizes the mandatory requirements set out in the Terms of Reference to assist in ensuring Proponents comply with all mandatory criteria, is located at Annex C.

Important Note: Proposals which fail, in the sole discretion of IDRC, to substantially 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.

Any rated requirements associated with the Terms of Reference are clearly identified in section 3.3

3.2.3 Presentations/Interviews Shortlist

A maximum of five (5) Proponents who have met all of the mandatory requirements and have rated the highest for the technical rated requirements will be invited to present or interview or both to key IDRC staff. Presentations/Interviews will preferably take place onsite at IDRC's Ottawa location, **at their own expense**, or if agreed by IDRC via video conferencing. The presentation will be evaluated based on demonstrating an understanding and knowledge to deliver the required services, and demonstrating the abilities, skills, and experiences of the project team. One of the members of the project team must be the project manager responsible for the Centre's possible contracts. Those shortlisted will be supplied with details on the presentation process (confirmation of presentation format, and any logistical requirements such as audio-visual).

Presentations will take place on February 22, 2017. Proponents must be available for this date, and Proponent's timeslot will be provided with reasonable notice. Presentation/interviews should be no longer than 45 minutes including questions. After the interview, the evaluation team may alter the scores previously allocated for each proponent based on the presentation/interview. The topics to be presented but are not limited to include:

1. Introduction of your organization, your key members involved in potential contracts
2. Provide a walk through your complete project management process from award to "go-live" and post "go-live".
3. If not already provided, describe your QA process including how you handle bugs and disagreements.
4. The Proponent to identify what are common risks involved (both internal and external) in being able to successfully deploy a web site and what strategies do you employee to mitigate these risks?

3.2.4 References

Those proponents that have been short-listed may then have their references checked to validate their responses to their proposal. The evaluation committee may change their scoring based on the responses from the references supplied.

3.2.5 Final Score

Total points will be calculated from those shortlisted and IDRC will select up to (5) five Proposals achieving the highest total points to become prequalified suppliers, subject to IDRC's reserved rights.

3.3 EVALUATION TABLES

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

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

- A Mandatories Requirements Checklist is provided in Annex C to assist in providing your submission.

RFSQ Section	Rated Requirements	Weighting (A)	Points 0-10 (B)	Score (A x B)
3.3.B	Experience and Qualifications	16		
3.3.B.1	Company description and personnel experience	8		
3.3.B.2	Technology and Project Experience	8		
3.3.C	Development Capabilities	40		
3.3.C.1	Design	10		
3.3.C.2	Development, content management, integration, QA,	18		
3.3.C.3	Privacy and security management	2		
3.3.C.4	Accessibility	5		
3.3.C.5	Customer Service	5		
3.3.D	Project Management	20		
3.3.D.1	Sample Plans/Reports	3		
3.3.D.2	Attention to details/Manage multiple tasks	8		
3.3.D.3	Manage long-term projects/multiple projects	2		
3.3.D.4	Understanding/use of the Agile methodology.	5		
3.3.D.5	Risks	2		
3.3.E	Implementation and Support Capabilities	16		
3.3.E.1	Implementation Plan	8		
3.3.E.2	Support	8		
3.3.F	Miscellaneous	8		
3.3.F.1	Understanding of IDRC and Project Requirements	3		
3.3.F.2	Comparison to competition	2		
3.3.F.3	Best suited to the Centre's needs	3		
Subtotal B-F:		100	N/A	

3.3.B Experience and Qualifications (16 Points)

1. Company Description & Sector Experience: The respondent should provide a description of their organization and an outline of the services they have previously and/or are currently delivering. This section should highlight any experience the respondent might have in the public sector (Government, Crown Corporations), research and development agencies/organizations, and international organizations.
2. Technology & Project Experience: The respondent should provide details about their experience with providing web services and maintenance projects along the examples indicated in the category. The respondent should include specific examples of web services (3 examples shall be provided) in which they have delivered within the past 16 months a fully responsive website using Drupal 7 and 8. Describe what the firms involvement was in developing these websites.

3.3.C Development Capabilities (40 points)

1. Design: (10 points)

- a. Business analysis: the development of requirements and functional specifications based on business needs. Please include a sample;
- b. Technical design specifications. Please include a sample;
- c. Information architecture, interface design and development services (e.g., AJAX, HTML, CSS, and graphical design).

2. Development: (18 Points)

- a. Demonstrate a thorough understanding in development and integration of web application features and functionality using Drupal 7 or 8. Please provide examples;
- b. Demonstrate the firm's ability to build multilingual sites (front and backend) that are fully responsive.
- c. Demonstrate the firm's experience in website development using LAMP stack.
- d. Describe Demonstrate the firm's sound development and source code management
- e. Documentation: The respondent should provide a list of documentation provided and their hand-off process including but not limited to:
 - Front End / Back End developer training
 - Inline documentation
 - Architecture and design documentation
 - Technical documentation
 - Architecture and design documentation
 - Technical documentation
 - User documentation
 - Source Code
- f. Documentation of code. Please describe the approach to code documentation;
- g. Quality assurance. Please include all processes in place to assure quality including automated testing frameworks in place;
- h. Deployment services. This includes any continuous integration processes, deployment of updates to production, any ongoing application maintenance processes which are available and the warranty period following the release of the work.
- i. ADFS deployment in Azure. Proponent to demonstrate how they are proficient in implementing Web single sign-on (SSO) capabilities, federation with Azure AD or O365 to enable users to authenticate using om-premises credentials and access all resources in the cloud.

3. Privacy and Security management: (2 Points)

The respondent should provide a description and provide two examples of the security and privacy measures they have used to protect applications they have developed. In particular, respondents should highlight any specific examples implementing solutions in compliance with Freedom of Information and Protection of Privacy Act (FIPPA)

4. Accessibility: (5 Points)

The respondent should provide a description and up to two examples of development they have

completed that demonstrates their compliance with Web Content Accessibility Guidelines (WCAG) 2.0 specifically Level AA.

5. Customer Service/Communication Skills: (5 Points)

The proponent should provide details that demonstrates how your firm builds and maintains productive relationships with clients

3.3.D Project Management (20 points)

1. The proponent to include any sample plans and/or reports that would be available;
2. Provide details how your firm demonstrates attention to details and ability to manage multiple tasks across different teams;
3. The proponent to provide information that demonstrates the firm's ability to manage long-term projects and juggle multiple projects at the same time;
4. Provide details that demonstrate the firms detailed understanding and use of the Agile methodology;
5. The Proponent to identify what are common risks involved (both internal and external) in being able to successfully deploy a web site and what strategies do you employee to mitigate these risks?

3.3.E Implementation and Support Capabilities (16 points)

1. Implementation Capabilities: (8 Points)

The respondent should provide a description of their abilities to provide support in the implementation of the application including:

- a. Implementation planning (e.g. roll out strategies from development through UAT to production)
- b. Training: modalities offered (e.g. classroom, one on one, remote, train-the-trainer), and ability to produce support materials (e.g. training manuals, FAQs)

2. Support Capabilities: (8 Points)

The respondent should provide a description of their abilities to provide support during the maintenance period and long-term support to the application including:

- a. Ongoing Support (e.g. Help Desk) and any service levels associated with each level of support provided (e.g. response and resolution times)
- b. Any regular reporting provided to the client on support (include examples of reports where possible)

3.3.F Understanding of IDRC and Project Requirements (8 Points)

1. The Proponent shall demonstrate that it has a **complete understanding** of: (3 Points)
 - a. IDRC; and
 - b. the objectives and requirements in Terms of Reference.
2. What separates you from your competitors? (2 Points)

3. Why are you best suited to meet the Centre's needs? (3 Points)

3.4 PROPONENTS FINANCIAL CAPACITY

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

3.5 SECOND STAGE COMPETITIVE PROCESS

After establishment of the prequalified roster list for provision of Drupal Website Design and Maintenance services, the following criteria will be used to make award decisions. The Centre may amend these criteria with written notification to the roster list.

1. Projects will be awarded according to the following process, which is subject to change:
 - a) Requirements with estimated values of less than \$50,000 may be awarded directly to a qualified supplier, based on past performance, level of experience, rotation of contracts or other factors within the Centre's discretion. The selected supplier will be asked to provide a pricing proposal for the specific requirements. If the Centre is satisfied with the proposal, it will forward the contract to the selected vendors for execution. The Centre may also conduct a second-stage competitive process as set out below for assignments of this value.
 - b) For assignments with estimated values greater than \$50,000 the Centre will invite qualified respondents from the roster list to submit quotations in response to the required services as part of second-stage competitive process. The Centre reserves the right to rotate possible awards to qualified suppliers that have not been awarded a contract during the Master Agreement term, which could remove previous qualified respondents from being included in the second-stage bidders list. The Centre will evaluate proposals based on: cost, anticipated time to complete the project, whether the firm is currently engaged in any projects that would provide limitations in terms of resources available to the Centre, rotation of contracts, and other factors within the Centre's discretion. The highest ranking respondent based on this second-stage process will be forwarded the contract for execution (according to the terms of the tender document).
2. While the Centre intends to use the list of qualified vendors created through this RFSQ as the main vehicle for procuring the required services, the Centre may obtain such services from suppliers not included on the qualified list at any time.
3. Any supplier whose performance fails to meet the Centre's performance expectations may be removed from the qualified roster list for required services. In addition, if a supplier repeatedly fails to submit a quotation in response to requests by the Centre (as set out above), that vendor may also be removed from the qualified list of providers. The Centre reserves the right to add a replacement supplier from the next highest scoring respondent to the RFSQ subject to interview.

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 RFSQ Section for full details	File	Contents
4.4	1.0	Cover Letter
4.5	1.0	Technical 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 RFSQ number and RFSQ title.
- b. The **primary contact person** with respect to this RFSQ: the individual's name, address, phone number and email address.
- c. A statement confirming the validity of the proposal (refer to section 5.4). **M**
- d. A statement confirming the Proponent does not have a conflict of interest with this RFSQ, real or perceived (refer to section 5.7). **M**
- 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 RFSQ. **M**

Note that some of the above requirements are Mandatory (indicated above with "M") and if not included in the cover letter, are still to be included in the proposal.

4.5 TECHNICAL PROPOSAL

4.5.1 Table of Contents

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

4.5.2 General

- i. In this section, the Proponent **must** provide detailed information relative to each requirement listed in the Terms of Reference, for both Mandatory and Rated Requirements, and clearly outline the work that the Proponent proposes to undertake for the provision of these services to IDRC.

ii. It is suggested that the Proponent follow the format outlined below (reference section **4.5.3** Response to the Terms of Reference) for its technical proposal.

The Proponent may also use a **table format** to supply a response of “Compliant” or “Non-Compliant” for each Mandatory Requirement. As part of the table format, for Mandatory and Rated Requirements, a statement should substantiate the response, or a reference to where it can be found within the submission, should be included. See examples:

Using a table format, an example of a response to a *Mandatory Requirement* would be:

Requirement	Response	Response details
Security Clearance	Compliant	All of our proposed personnel have “Reliability Status”.

Using a table format, an example of a response to a *Rated Requirement* would be:

Requirement	Response	Response details
Outline years of experience	15 years	Refer to section x, page x. (or provide full response here)

SECTION 5 – CONDITIONS

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

5.1 ENQUIRIES (M)

All matters pertaining to this RFSQ 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 nine (9) working days prior to the closing date.** When submitting, Proponents *email subject line* should cite **"RFSQ # 16170017, Web Services Development and Maintenance"**.

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

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

Important note: Proponents must download all RFSQ documents directly from the Buy and Sell website. IDRC will not distribute RFSQ 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 **"RFSQ # 16170017, Web Services Development and Maintenance"** 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 **one (1) file**: the cover letter and technical 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.

5.3.4 Multiple Proposals

IDRC will accept only one (1) proposal per Proponent.

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 RFSQ, including but not limited to any clarifications, interviews, presentations, subsequent proposals, review, selection or delays related thereto or occurring during the RFSQ process, are the sole responsibility of the Proponent and will not be chargeable in any way to IDRC.

5.6 GOVERNING LAWS

This RFSQ 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 RFSQ.

5.8 RIGHTS OF IDRC

IDRC does not bind itself to accept any proposal submitted in response to this RFSQ, 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 RFSQ or in such a Proponent’s proposal.

After selection of preferred proposals, if any, IDRC has the right to negotiate with the preferred Proponents and, as a part of that process, to negotiate changes, amendments or modifications to the proposals 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 RFSQ, including, if applicable to this RFSQ, contacting the named reference contacts;
- b. modify, amend or revise any provision of the RFSQ 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 RFSQ 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 RFSQ at any time, without any liability whatsoever to any Proponent;
- i. award all or any part of the requirements to one or more Proponents based on quality, services, and any other selection criteria indicated herein; and
- j. retain all proposals submitted in response to this RFSQ.

5.9 PROPOSED CONTRACT

5.9.1 Resulting Contract

Annex A has been provided as part of the RFSQ 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 should the Proponent be successful in award of contract in stage two (2) of the tendering process. 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 RFSQ 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

Annex **A** has been posted to buyandsell.gc.ca as a separate document for retrieval by Proponents.

ANNEX B – Reference Check Form for Evaluators**Subject:** Reference Check**RFSQ #:** 16170017**RFSQ Title:** Web Services Development and Maintenance

Proponent name: _____

Reference name: _____

Name of Project Manager:

Name of Main Contact (if different from above):

Contacted by: _____
IDRC printed

Overall Rating out of 10: [insert rating here]

1) Length of time working together & services provided

2) Ease of doing business (strong points & weak points)

3) Flexibility and availability

4) Was project delivered on time and within contract budget? If exceeded budget and timelines, was this a fault of the Proponent and if so, what was the reason(s)?

5) Any comments on the Proponents:

- organizational skills, attention to details, ability to manage multiple tasks across different teams
- Communications skills, ability to build and maintain productive relationships with clients
- Ability to manage long-term projects and juggle multiple projects at the same time.

8) Would you use them again and if so, what would you change if anything based on your experience?

ANNEX C – Mandatory Requirements Checklist

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

As stated in **Section 4.5.2 Response to the Terms of Reference**, the Proponent **must provide detailed information relative to each requirement**.

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).

	Mandatory Requirements	Compliant (yes or no)	Response
	General		
M1 / 4.4 e.	Proposal was signed		
M2 / 5.1	Followed Enquiries instructions		
M3 / 5.2	Met submission close date and time		
M4 / 5.3	Followed proposal delivery instructions		
M5 / 5.4	Validity of Proposal (90 days)		
M5 / 5.7	Provided Conflict of Interest Statement		
	Company Information		
M6 / ANNEX D	<p>Company References: Each respondent must provide three (3) references from clients who have obtained Drupal 7 and 8 web services from the respondent in the last eighteen (18) months. The references must include at least one (1) Drupal 7 and at least one (1) Drupal 8 implementation. The respondent should provide a completed Reference Form in accordance with the instructions set out in the Form attached as Annex D to the RFSQ.</p> <p>Note: IDRC reserves the right to contact these references. IDRC cannot be used as a reference towards this RFSQ.</p>		
	Project Management		
M7	The proponent to provide number of years of experience by each team member that could be assigned to potential contracts.		
M8	The proponent to provide information on the firm’s organizational skills. This should include its attention to details,		

	ability to manage multiple tasks across different teams, etc.		
M9	The proponent to provide number of years of experience each team member has using Agile methodology.		
M10	The proponent to provide information that demonstrates its ability to manage long-term projects and juggle multiple projects at the same time.		
	Communication Skills		
M11	The proponent to provide information that describes its ability to build and maintain productive relationships with clients. The proponent to have a minimum of 3 long-term clients greater than 2 years.		
	Project Experience		
M12	Proponent to provide 3 recent (within the last 16 months) examples of fully responsive websites built on Drupal 7 or 8.		
M13	Proponent to provide 2 samples of their product test plans.		
	Warranty		
M14	Proponent's warranty meets minimum 3 month requirement		
	Miscellaneous		
M15	Proponent to provide statement that the proponent understands that no travels costs, expenses or fees while travelling to meetings at IDRC's HQ's offices in Ottawa are reimbursable for both the RFSQ and any resulting contract/s.		
M16	The Centre's core working hours for meetings are between 9am to 3pm EST, Monday to Friday. The Proponent to confirm that they are able to have all team members be available during these times for meetings and scrums regardless of the time zone the team member(s) reside in		
M17	Proponent agrees to accept IDRC's NDA Agreement as attached as Annex E.		

ANNEX D – Reference Form

Each proponent is requested to provide three (3) references from clients who have obtained goods or services similar to those requested in this RFSQ from the proponent in the last eighteen (18) months.

Reference No. 1

Company Name:	
Company Address:	
Contact Name:	
Contact Telephone Number:	
Contact Email:	
Date Work Undertaken:	
Nature of Assignment:	

Reference No. 2

Company Name:	
Company Address:	
Contact Name:	
Contact Telephone Number:	
Contact Email:	
Date Work Undertaken:	
Nature of Assignment:	

Reference No. 3

Company Name:	
Company Address:	
Contact Name:	
Contact Telephone Number:	
Contact Email:	
Date Work Undertaken:	
Nature of Assignment:	

ANNEX E – Non-Disclosure Form

Non-Disclosure Agreement for <NAME> in relation to work with the International Development Research Centre (IDRC)

WHEREAS:

- a) IDRC has engaged <NAME> to provide <Brief description of work> (work) under <Contract Name and Reference Number OR date and subject line of email or other request for services or products> signed between <NAME> and IDRC on <Date>;
- b) As part of this process, <NAME> requires access to IDRC computer systems and Confidential Information; and
- c) In consideration of IDRC's release of information and provision of access to IDRC computer systems in order for <NAME> to perform the work;

NOW THEREFORE, <NAME> agrees as follows:

1. *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 IDRC, and includes, without limitation, IDRC's information and information provided by IDRC concerning research, experimental work, development, design details and specifications, engineering, financial information, procurement requirements, purchasing, manufacturing, and marketing plans and information.
2. *Derivatives* shall mean:
 - a. for copyrightable or copyrighted material, any translation, abridgement, revision, or other form in which an existing work may be recast, transformed, or adapted;
 - b. for patentable or patented material, any improvement thereon; and
 - c. 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.
3. <NAME> agrees that it/she/he will use the Confidential Information and Derivatives only in accordance with the relevant Statement of Work or in accordance with this Agreement.
4. <NAME> agrees that it/she/he will not, without authority, make use of, disseminate or in any way disclose any Confidential Information or Derivatives to any person, firm or business.
5. <NAME> agrees that it/she/he shall disclose Confidential Information or Derivatives 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 or Derivatives, to be bound by the terms and conditions of this Agreement. <NAME> further agrees that its, his or her employees or subcontractors have read and agree to be bound by applicable IDRC policies, as detailed below.

6. Prior to commencing work, <NAME> agrees to read and to be bound by applicable IDRC policies including the Acceptable Use Policy for Centre Information and Electronic Systems, the IT Security Policy, and the Information and Records Management Policy.
7. <NAME> shall take all reasonable precautions at all times (and in any event, efforts that are no less than those used to protect its/her/his own confidential information) to protect Confidential Information and Derivatives from disclosure, unauthorized use, dissemination or publication.
8. <NAME> will immediately give notice to IDRC of any unauthorized use or disclosure of Confidential Information or Derivatives.
9. <NAME'S> obligations as contained in this Agreement shall terminate when <NAME> can document that:
 - a. the Confidential Information was in the public domain at or subsequent to the time it was communicated to <NAME> by IDRC through no fault of <NAME> or <NAME'S> employees or subcontractors;
 - b. it was rightfully in <NAME'S> possession free of any obligation of confidence at or subsequent to the time it was communicated to <NAME> by IDRC; or
 - c. it was developed by <NAME>, its employees or agents independently of and without reference to any information communicated to <NAME> by IDRC.
10. A disclosure of Confidential Information or Derivatives (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 Agreement, shall not be considered to be a breach of this Agreement or a waiver of confidentiality for other purposes; provided, however, that <NAME> shall provide prompt written notice thereof to enable IDRC to seek a protective order or otherwise prevent such disclosure.
11. All Confidential Information and Derivatives, whether created by IDRC or <NAME>, remain the property of IDRC and no license or other rights to Confidential Information or Derivatives is granted or hereby implied.
12. <NAME> shall have the necessary security clearance level relating to the sensitivity level of Confidential Information and Derivatives accessed in the course of performing work.
13. <NAME> agrees that it/she/he will only use the rights and permissions granted to <NAME> in performance of work on any system or application under the Statement of Work, agrees to safeguard any such rights and permissions; and further agrees to ensure that <NAME'S> employees and subcontractors equally abide by this provision.
14. Upon <Contract Name and Reference Number> termination or expiration, <NAME> must return to IDRC all physical devices (computers, phones, USBs, etc.) belonging to IDRC that have been used in provision of the work. Additionally, project information / data, proprietary materials and any other Confidential Information, physical or electronic, and any Derivatives, must be returned to IDRC; any copies not returned to IDRC must be destroyed or irretrievably erased in accordance with industry best practices for the relevant sensitivity level of information. Once

data destruction or erasure is complete, <NAME> agrees that a confirmation notification, detailing the method of data destruction, shall forthwith be submitted to IDRC if requested.

15. <NAME> agrees to indemnify IDRC for all damages, costs, claims, actions and expenses (including court costs and reasonable legal fees) incurred by IDRC as a result of <NAME> or <NAME'S> employees' or subcontractors' failure to comply with its obligations under this Agreement, and <NAME> further agrees to defend and participate in the defence of any claim or suit alleging that IDRC has a liability with respect to any Confidential Information or Derivatives it may have acquired from a third party; with regard to any unauthorized disclosure, provision or making available of any such Confidential Information or Derivatives.

16. This Agreement comes into effect on _____ and shall apply in respect of Confidential Information and Derivatives accessed and disclosed before, on, or after the effective date. The obligations contained herein survive the termination or expiration of this Agreement and <Contract Name and Reference Number> referred to above.

Signed (<NAME>): _____ Date: _____