

REQUEST FOR PROPOSAL (“RFP”)

RFP Title: 17180013	RFP #: Think Tank Initiative Policy Community Survey
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Table of Contents

SECTION 1 – INTRODUCTION	4
1.1 IDRC OVERVIEW	4
1.2 PURPOSE OF THIS RFP	4
1.3 DOCUMENTS FOR THIS RFP	4
1.4 TARGET DATES FOR THIS RFP	4
SECTION 2 – STATEMENT OF WORK	6
2.1 BACKGROUND	6
2.2 GOALS OF THE POLICY COMMUNITY SURVEY.....	6
2.3 OBJECTIVE OF THE CONSULTANCY.....	7
2.4 KEY ACTIVITIES.....	7
2.5 PROJECT LIMITATIONS	8
2.6 PROJECT BUDGET	9
2.7 ADDITIONAL PHASES OF WORK	9
2.8 IDRC RESPONSIBILITIES, SUPPORT, AND REPRESENTATIVES	9
2.9 LOCATION OF WORK AND TRAVEL.....	9
2.10 LANGUAGE OF WORK.....	9
2.11 DELIVERABLES AND TIMETABLE/SCHEDULE	10
SECTION 3 – PROPOSAL EVALUATION	11
3.1 EVALUATION COMMUNICATION	11
3.2 EVALUATION METHODOLOGY	11
3.4 PROPONENT FINANCIAL CAPACITY	12
3.5 PROPONENT SELECTION.....	12
SECTION 4 – PROPOSAL FORMAT	13
4.1 GENERAL.....	13
4.2 OFFICIAL LANGUAGES	13
4.3 ORGANIZATION OF RESPONSES	13
4.4 COVER LETTER	13
4.5 TECHNICAL PROPOSAL	13
4.6 FINANCIAL PROPOSAL	14
SECTION 5 – CONDITIONS	16

5.1 ENQUIRIES 16

5.2 SUBMISSION DEADLINE..... 16

5.3 PROPOSAL SUBMISSION INSTRUCTIONS 16

5.4 VALIDITY OF PROPOSAL 17

5.5 PROPONENTS COSTS 17

5.6 GOVERNING LAWS 17

5.7 CONFLICT OF INTEREST 17

5.8 CAPACITY TO FULFILL CONTRACT 17

5.9 RIGHTS OF IDRC..... 17

5.9 PROPOSED CONTRACT 18

ANNEX A – Resulting Contract Terms and Conditions 19

ANNEX B – Mandatory Requirements Checklist..... 27

ANNEX C – Rated Requirements Checklist 29

ANNEX D –Travel 30

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 was established by an act of Canada’s parliament in 1970 with a mandate “to initiate, encourage, support, and conduct research into the problems of the developing regions of the world and into the means for applying and adapting scientific, technical, and other knowledge to the economic and social advancement of those regions.”

A **Canadian Crown corporation**, IDRC supports leading thinkers who advance knowledge and solve practical development problems. IDRC provide the resources, advice, and training they need to implement and share their solutions with those who need them most. In short, IDRC increases opportunities — and makes a real difference in people’s lives.

Working with development partners, IDRC multiplies the impact of investment and brings innovations to more people in more countries around the world. IDRC offers fellowships and awards to nurture a new generation of development leaders.

IDRC employs about 400 people at the head office located in Ottawa, Canada, and in four (4) regional offices located in Cairo-Egypt, New Delhi-India, Nairobi-Kenya, and Montevideo-Uruguay Cairo, Egypt.

IDRC is governed by a board of up to 14 governors, whose chairperson reports to Parliament through the Minister of International Development.

For more details visit: www.idrc.ca

1.2 PURPOSE OF THIS RFP

The International Development Research Centre (“IDRC”) requests proposals for provision of Consulting Services to meet IDRC requirements as outlined in Annex “A” – Terms of Reference.

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 Requirements Checklist
- Annex C – Rated Requirements Checklist
- Annex D – Travel

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 which may be entered into by IDRC and the selected Proponent.

Event	Date
RFP issue date	See page 1
Deadline for Enquiries	See section 5.1
RFP close date	See page 1

Evaluation	June 28-30, 2017
Notification of Short-Listed Proponents for Interview (if Required)	June 30, 2017
Interviews/Presentations by short-listed Proponent(s) (if Required)	July 4-7, 2017
Tentative Award	July 7, 2017
Finalize Contract with Lead Proponent	July 10-14, 2017
Commencement of Services	July 14, 2017

SECTION 2 – STATEMENT OF WORK

2.1 BACKGROUND

The Think Tank Initiative (TTI) is a major collaborative program funded jointly by the William and Flora Hewlett Foundation, the Bill & Melinda Gates Foundation, the International Development Research Centre (IDRC), the UK Department for International Development (DFID), and the Norwegian Agency for Development Cooperation (NORAD). The initiative was conceptualized based on the understanding that public policies work best when they are designed and implemented by local actors. Without locally generated information and analysis, public policies often do not respond to realities on the ground. However, developing country policy research institutes often do not receive the type of long-term, flexible funding they need to recruit talent, develop a strong research agenda, and plan for the future. Consequently, most policy research institutes engage in responsive research rather than proactively setting a research agenda that is aligned to locally determined needs and priorities.

The purpose of the TTI is to strengthen a select group of independent policy research institutions or “think tanks” in developing countries to provide objective, high-quality research that both informs and influences social and economic policies that contribute to the development of more equitable and prosperous societies. The initiative’s theory of change is based on the conviction that providing policy research institutions the financial and technical support they need to improve research quality and organizational performance will in turn enable them to play a more effective role in policy debates, providing policymakers and others the objective evidence needed to develop and implement sound social and economic policies. It is expected that financial and technical support from the Initiative will help consolidate these institutions’ role as credible development actors in their country.

Following a rigorous and competitive selection and assessment process, 43 institutions in East and West Africa (18), Latin America (11) and South Asia (14) currently participate in the second five-year phase of TTI (2014-2019).

Further Information on the Think Tank Initiative

To learn more about the Think Tank Initiative, interested organizations may visit the official website of the initiative at www.thinktankinitiative.org

2.2 GOALS OF THE POLICY COMMUNITY SURVEY

The Think Tank Initiative (TTI) is an ambitious program, and has developed an equally ambitious and far-reaching monitoring and evaluation (M&E) strategy to better understand what is achieved over time.

As part of this strategy, the program wishes to track perceptions about the role of grantee think tanks in national policy processes. As such, the goal of the policy community survey is to scope the views of the policy-making community regarding the capacity of think tanks in general, of Think Tank Initiative grantees in particular, to undertake high-quality policy-relevant research and to influence policy making processes. In addition to the 20 countries where the Think Tank Initiative is currently engaged, the survey will also include two additional countries where Think Tank Initiatives may be involved in future.

The Policy Community Survey has three overall aims:

- a) To shed light on the nature of the demand side of the wider policy community in which think tanks in a specific country are operating, and to indicate how each think tank is perceived as contributing to national policy processes and other policy demands in that country;
- b) To provide a basis for reflection by each think tank on their own performance, which will help them identify some critical organizational capacity needs that should be met;

- c) To indicate broad changes in the policy community in a particular country over time and the extent to which each think tank is perceived to have adapted to those changes as they occur.

Between 2009 and 2011 the first round of the Think Tank Initiative's Policy Community Survey was conducted in Africa (2009-10), and subsequently in Latin America, and South Asia (2010-11). In 2013, the second round of the Policy Community Survey was conducted in Africa, Latin America and South Asia concurrently. In 2017, IDRC wishes to proceed with the third round of the survey, again in Africa, Latin America and South Asia concurrently, and with the addition of two Southeast Asian countries. In Africa the survey will be fielded in 8 countries, 3 in West Africa (Ghana, Nigeria, and Senegal) and 5 in East Africa (Ethiopia, Kenya, Rwanda, Tanzania, and Uganda). In Latin America the survey will be fielded in 7 countries (Bolivia, Ecuador, El Salvador, Guatemala, Honduras, Paraguay, and Peru). In South Asia the survey will be fielded in 5 countries: (Bangladesh, India, Nepal, Pakistan, and Sri Lanka). Lastly in Southeast Asia, the survey will be fielded in 2 countries: Indonesia and Myanmar.

The objectives of the survey remain the same as the original surveys, with the addition of the fourth objective, related to tracking results over time, added in the 2013 survey. The specific objectives of the third round of the Policy Community Survey are:

1. Develop an understanding of the policy community in specific countries;
2. Understand the strengths and weaknesses of particular think tanks, as perceived by a subset of the policy community;
3. Understand what activities are associated with the success of think tanks in order to help prioritize support strategies—e.g., funding, training, and technical assistance; and
4. Track changes overtime by comparing the results from this third round of the Survey with the results from the first two rounds, in order to understand if changes in the results have occurred.

2.3 OBJECTIVE OF THE CONSULTANCY

IDRC is seeking a consultant to carry out a Policy Community Survey in the 8 countries in East and West Africa, and the 12 countries in South Asia and Latin America, where the Think Tank Initiative is working, as well as in 2 Southeast Asian countries where future TTI and IDRC programming may take place.

2.4 KEY ACTIVITIES

The following key activities will be carried out by the Consultant:

1. In collaboration with IDRC staff, finalizing the Policy Community Survey. The survey instrument used in the first two rounds of the Policy Community Survey will be provided by IDRC and should be adapted based on lessons learned through the experience of the previous rounds of the Survey. A balance will be required between making necessary revisions in the survey instrument and maintaining an acceptable level of consistency between the instruments used in the first, second and third rounds.
2. In collaboration with IDRC staff, finalizing the list of survey respondents which should include respondents from different sectors involved in national policy making (e.g. high-ranking government officials, members of parliament, media, not-for-profit organizations, members of the research community, trade unions etc.). An initial list of respondents will be provided by IDRC, informed partly by names and contact details of potential

respondents gathered for the first two rounds of the Survey. The consultant will be expected to add to and complete this list.

3. Carrying out the survey in English or French in the 8 East and West African countries where the Think Tank Initiative is working. In general, 40 to 50 surveys should be completed in each country. A combination of methods should be used according to the needs of the context, including on-line survey completion, telephone and face-to-face interviews.
4. Carrying out the survey in English in the 5 South Asian countries and in Spanish in the 7 Latin American countries where the Think Tank Initiative is working. **In general, 40 to 50 surveys should be completed in each country, with the exception of India, where 80 surveys should be completed.** A combination of methods should be used according to the needs of the context, including on-line survey completion, telephone and face-to-face interviews.
5. Carrying out the survey in English in the 2 Southeast Asian countries where the Think Tank Initiative and other IDRC programs are exploring programming around providing support to policy research institutions. In general, 40 to 50 surveys should be completed in each country. A combination of methods should be used according to the needs of the context, including on-line survey completion, telephone and face-to-face interviews.
6. Based on the results of these surveys, build a strong set of data that builds upon the baseline data collected during the first surveys. IDRC will require full access to this data and will store it in the Think Tank Initiative's dedicated monitoring and evaluation database.
7. Drawing upon the data and analysis, a technical report should be completed for each region (Africa; South Asia; and Latin America) which responds to the 4 main objectives of the study, including a user-friendly feedback report for each of the 43 Think Tank Initiative's grantee institutions on stakeholder perceptions of their performance.
8. Drawing upon the findings of the three regional reports, an overall global technical report should be prepared for a public audience that captures key findings and insights from the Survey, and identifies issues and implications for provision of support to think tanks in the countries surveyed.
9. Drawing upon the main findings from the three Surveys conducted during the lifetime of TTI, including lessons cited in the existing reports from the first and second Surveys and the new findings from this third Survey, a Policy Brief should be prepared for public distribution which presents a synthesis of the overall key findings from the Surveys. Reports can be found on the TTI website <http://www.thinktankinitiative.org/results>.
10. Drawing upon the findings from the reports and the Policy Brief, public engagement efforts, which may include use of online stakeholder engagement mechanisms managed by the Proponent, should be undertaken that convene interested actors to share and discuss the key findings and insights from the Survey, as well as implications for national and regional policy research efforts and institutions. Reports can be found on the TTI website <http://www.thinktankinitiative.org/results>.

2.5 PROJECT LIMITATIONS

Given that previous rounds of the Policy Community Survey have been completed in a successful and timely manner, we do not anticipate any major limitations, risks or constraints that could affect the overall success of the project. However, given the addition of two new countries where the PCS has not been conducted in previous phases, there is the possibility that the time or cost of undertaking this type of data collection in those contexts is slightly more burdensome than in other contexts; thus, the budget and timeline have been developed with sufficient flexibility so as to mitigate any potential risks in this regard.

2.6 PROJECT BUDGET

The anticipated project budget including all travel and related expenses will be CAD 600,000 including taxes.

2.7 ADDITIONAL PHASES OF WORK

There is a possibility that future phases of the Policy Community Survey will be undertaken in the coming years. IDRC reserves the right to negotiate directly with the successful Proponent to enter into a contract for the future phases.

2.8 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. 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. It is however expected that the Proponent will identify and work in close collaboration with local contacts in the 22 countries to facilitate data collection.

IDRC will identify a **Travel Administrative Representative**, who will manage all travel requirements approved by the Project Authority.

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, and answer questions on terms and conditions.

2.9 LOCATION OF WORK AND TRAVEL

Work is to be conducted at the corresponding study sites, and the Proponent is expected to travel as needed. The Proponent will be compensated for travel costs, and provided with an all-inclusive daily fee rate for each person who will perform the work. Any work beyond data collection (including analysis and writing) is to take place at the Proponent's site. IDRC will not provide onsite facilities for the Proponent, other than providing facilities for on-site meetings.

2.10 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.

2.11 DELIVERABLES AND TIMETABLE/SCHEDULE

A resulting Contract is expected to commence on July, 2017 and conclude by August 31, 2018. The deliverables schedule are to be completed based on the following schedule

	Deliverable	Timeline
1.	Final survey instrument for African countries	6 weeks after the contract is signed
2.	List of Respondents for African countries	8 weeks after the contract is signed
3.	Final survey instrument for South and Southeast Asian and Latin American countries	By 30 September 2017
4.	List of Respondents for South and Southeast Asian and Latin American countries	By 30 September 2017
5.	a. Narrative Report and Data Analysis for African countries b. Completed Surveys and Data Set c. 2-page "factsheet" on findings relating to each individual Think Tank Initiative grantee in Africa	By 31 January 2018
6.	Final Technical Report for African countries	By 28 February 2018
7.	a. Narrative Report and Data Analysis for South and Southeast Asian and Latin American countries b. Completed Surveys and Data Set c. 2-page "factsheet" on findings relating to each individual Think Tank Initiative grantee in South Asia and Latin America	By 31 May 2018
8.	Final Technical Report for South and Southeast Asian and Latin American countries	By 30 June 2018
9.	Final "global" Technical Report highlighting key findings, insights and lessons from all surveys in second round of Policy Community Survey	By 31 July 2018
10.	Public engagement event or forum organized to share key findings and insights with a broad array of actors in the policy research community	By 31 August 2018

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

IDRC will use the following methodology to evaluate Proposals:

3.2.1 Step 1 - Mandatory Requirements

Each Proposal will be examined to determine compliance with all IDRC's **Mandatory Requirements** as set out in **Annex B**. Non-compliant Proposals will receive no further consideration.

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

3.2.2 Step 2 - Rated Requirements

Compliant Proposals will be evaluated and attributed points according to the degree to which they meet or exceed IDRC's **Rated Requirements** as set out in **Annex C**.

RFP Section	Rated Requirements	Weighting A	Points 0-10 B	Score A x B
Annex C	Proposal section	9		
"	Experience In section	12		
"	Understanding of section	6		
	Total %	93.1		

Points Table	
Points	Points Description
0	Barely addresses any of the stated requirements and completely lacking in critical areas.
3	Adequately meets most of the stated requirements. May be lacking in some areas which are not critical.
5	Meets all stated requirements
7	Exceeds the stated requirements but in a manner which may not add additional value to the stated requirements.
10	Exceeds the stated requirements in superlative and beneficial ways.

3.2.2a Step 2a – Presentation/Interviews (Optional)

Proponents *may* be invited at their own expense to make a presentation and attend an interview at IDRC (Ottawa) or via telephone/videoconference prior to final selection. Any presentations and interviews will form part of the rated requirements of the proposal.

3.2.3 Step 3 - Financials

Once the Technical Proposals have been rated, Financial Proposals will be scored. The points for price will be awarded by multiplying the total number of points available for price (given to the lowest price) by the lowest priced proposal, and dividing the result by each proponent's price.

$$\text{Score} = \frac{\text{Min} \times \text{M}}{\text{P}}$$

Min: lowest priced proposal
M: total points available for price
P: price on proposal

Estimated costs for travel expenses (per diems, mobilization, airfares etc.) will NOT be used to evaluate the financial proposal.

RFP Section	Rated Requirements	Weighting A	Percentage relative to lowest score	Score A x B
4.6	Total pricing, exclusive of taxes	6.9		
	Total %	6.9		

3.2.4. Step 4 - 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.

3.4 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 5.9, 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 no later than 72 days following the award of a Contract. Upon request from an unsuccessful Proponent, IDRC will provide the reasons why that particular proposal was not selected.

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 no more than seven (7) pages (letter or A4 format) in length (excluding cover letter, TOC, stipulated attachments and Curriculum Vitae), using a minimum 11-point easy to read font (smaller font can be used for short footnotes) and 2.5 centimeter margins (1”) all around. Elaborate or unnecessary voluminous proposals are not desired.

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	2.0	Technical Proposal, including this RFP's Annex B- Mandatory Requirements Checklist , and Annex C- Rated Requirements Checklist
4.6	3.0	Financial Proposal

4.4 COVER LETTER

Note that some of these requirements are mandatory as indicated with (M) in the description.

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). **(M)**;
- d. A statement confirming the Proponent does not have a **conflict of interest** with this RFP, real or perceived (refer to section 5.7). **(M)**
- e. A statement confirming the capacity to perform the contract if awarded (refer to section 5.8). **(M)**
- f. 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. **(M)**

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 Response to the Statement of Work

The Proponent **must** provide detailed information relative to each requirement listed in the Statement of Work, in **Annex B- Mandatory Requirements Checklist**, and in the **Annex C- Rated Requirements Checklist**, and clearly outline the work that the Proponent proposes to undertake for the provision of these Services to IDRC.

4.5.3 Requirements Checklists

- a. When responding, the Proponent **must** complete and include the response grid found in **Annex B- Mandatory Requirements Checklist**.

- b. When responding, the Proponent **must** complete and include the response grid found in **Annex C- Rated Requirements Checklist**.

4.6 FINANCIAL PROPOSAL

4.6.1 General

The Proponent must provide a *separate* response relative to the pricing of its proposed solution.

4.6.2 Financial Requirements

The Proponent **must** provide pricing for all of its proposed Services.

Financial Requirements	Weight (%) 6.9
<p>a. The Proponent is to state the assumptions underlying its financial proposal.</p>	
<p>b. All prices are to be quoted in Canadian dollars (CAD) and be inclusive of the Goods and services Tax (GST) or Harmonized Sales Tax (HST). The GST or HST, whichever is applicable, quoted by the Proponent and will be paid by IDRC. Taxes must be included on a separate line.</p> <p>If the Proponent will not be charging IDRC taxes, an explanation should be provided. See the Notes below for more details on taxes.</p>	
<p>c. All prices must include a detailed breakdown following the response to section 2 (Statement of Work). Prices shall include all components normally included in providing the proposed services such as professional fees, disbursements, engagement support expenses, etc.</p> <p>All prices must include a detailed breakdown and include at a minimum the following:</p> <ul style="list-style-type: none"> i. all inclusive daily rate applicable to proposed personnel who will do the work; ii. estimated total number of billable days to do the work; iii. estimated number of days to be spent in at IDRC's Ottawa office, if applicable. iv. estimate of travel expenses (as a separate cost) for proposed solution. This estimate will be used to qualify that the proposed solution meets within the budget requirements but will not be used to evaluate the financial proposal scoring. IDRC will be responsible for booking all travel (air and train) based on IDRC's travel policy and providing standard per diems rates. <p>IDRC will not be billed for travel time to and from any work site, for any purpose. Cost of such time will be the sole responsibility of the selected proponent.</p>	
<p>d. The Proponent shall propose an invoicing schedule if other than providing one (1) invoice upon completion of all Services.</p> <p><i>Important Notes:</i></p> <ul style="list-style-type: none"> • IDRC's payment terms are NET 30 and IDRC will make no advance on fees. • Maximum of one invoice per month permitted. 	
<p>e. Proponents who must travel to Ottawa for onsite work must indicate if there will be fees chargeable to IDRC.</p> <p>All travel costs will be in line with IDRC's Travel Policy guidelines (reference Annex D for more details).</p>	
<p>Notes:</p>	
<p>1. Taxes</p> <p>1.1 Vendors hired to deliver goods and or services in Canada (regardless of their place of origin) must include all costs on their invoices for the purpose of calculating the applicable taxes <i>payable by IDRC</i>.</p> <p>1.2 In accordance with the income tax regulations of Canada, <i>IDRC must withhold 15% of fees and non-exempt expenses of non-resident Vendors working in Canada</i> for transmittal to the Canada Revenue Agency ("CRA").</p>	

Such holdback may be either waived by the Canada Revenue Agency ahead of payment (the Vendor must secure the waiver himself / herself) or refunded later to the Vendor by the authorities of his / her country of residence (where the country in question has a tax treaty with the Government of Canada), upon the Vendor satisfying the country's revenue declaration requirements. Withholding by IDRC does not constitute sufficient reason to increase the negotiated fee. Tax matters remain entirely the responsibility of the Vendor. Waiver applications and information can be found on CRA's website: <http://www.cra-arc.gc.ca/tx/nnrdsnts/cmmn/rndr/menu-eng.html>

1.3 In accordance with the tax regulations of the jurisdictions of IDRC's Regional Offices (which are located outside of Canada), other tax regulations may apply.

4.6.3 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

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** by *June 15, 2017* in order to receive a response prior to the close date. When submitting, Proponents *email subject line* should cite **"RFP # 17180013 - RFP TTI Policy Community Survey"**.

The Contracting Authority will provide all answers to significant enquires received 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

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

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

5.3.1 Method of Sending

Proposal submission shall be 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 # 17180013 – TTI Policy Community Survey"** 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 **three (3) files**: one (1) for the cover letter, one (1) for the 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.

5.3.4 Multiple Proposals

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

5.4 VALIDITY OF PROPOSAL

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

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 CAPACITY TO FULFILL CONTRACT

The Proponent to provide a statement that there are no activities, relationships or contracts which render the Proponent unable or potentially unable to diligently perform the duties and obligations required of the Proponent if awarded the Contract.

5.9 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

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.

ANNEX A – Resulting Contract Terms and Conditions

A1. Definitions

For the purposes of this Contract:

Administrative Representative shall mean the person designated within the main body 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.

Contract shall mean the main body of this contract including any and all attachments incorporated therein by reference. In the event of a conflict between the main body of the Contract and Attachment A, the main body of the contract shall prevail.

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 Advance and Schedule of 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 sections** 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 **Advance and Schedule of Payments 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

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) either by courier at the address set out in this contract, from a nearby airline office (via a prepaid ticket advice), or via electronic ticketing.

Under no circumstances will the Centre entertain the Consultant making his or her own reservations and billing the Centre. When the Consultant's travel includes destinations not covered under the scope of this Contract, the Consultant must contact the Centre's Administrative Representative to exercise one of the following options:

- to prepay to the Centre's designated travel agency his or her share of the itinerary unrelated to this Contract; or
- to have the Centre prepay its share of the itinerary directly to the Consultant's travel agency.

Consultants who find significantly less expensive fares to those offered by the Centre's travel agency for the same travel parameters are also encouraged to contact the Centre's Administrative Representative to discuss the possibility of taking advantage of the less expensive fares, which are nonetheless to be prepaid by the Centre.

For further information or clarifications, contact the Centre Administrative Representative.

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, Personal Safety and Health

The Consultant is responsible for taking out at its own expense any insurance (travel, hospitalization, medical, trip cancellation or other) deemed necessary while executing this Contract. The Centre's travel agency will not advise the Consultant of the availability of insurances unless specifically requested by the Consultant at the time of booking travel. Any insurance acquired by the Consultant from the Centre's travel agency shall be at the expense of the Consultant.

Consultants have the exclusive responsibility for maintaining personal safety and good health during the period of this Contract. The Centre strongly suggests that they consult the diplomatic and consular authorities of the country of their nationality with a view to heed the travel recommendations applicable in the countries to be visited under this Contract. It is the responsibility of the Consultants to seek information and advice from any other reliable sources.

Should travel to the destinations of this Contract not be advised by the authorities, the Consultant must immediately upon making that determination advise one of the Centre representatives who will, at his or her option, either terminate the Contract, or with the Consultant's agreement, defer performance until such time as the restrictions on travel are removed, or propose an alternative work plan for the Consultant's agreement.

The Centre also strongly suggest that Consultants seek guidance from qualified health personnel concerning potential health risks in the areas to be visited. In preparing for a trip to a developing country, Consultants should receive all recommended immunizations and take malaria prophylaxis when travelling to an area where malaria is endemic. The Centre especially recommends that:

- a traveler's clinic be consulted if possible;
- health and accident insurance, including coverage for emergency evacuation, be obtained.

Traveller's health information is available in the public domain, including from World Wide Web sites such as <http://www.tripprep.com/> or those maintained by the World Health Organization, Health Canada and the United States Centers for Disease Control and Prevention.

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 by 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

In addition to the Centre's termination rights contained in the main body of this Contract, 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);
- 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 Requirements Checklist

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.

Proposals which fail in the sole discretion of IDRC to meet any Mandatory requirement will be eliminated from further consideration in the evaluation process. However, IDRC reserves the right to waive any Mandatory requirements if it deems fit and appropriate to meet the interests of and provide best value to IDRC. This clause should be interpreted solely for the benefit of IDRC and not for the benefit of the Proponent.

INSTRUCTIONS:

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

PART 1: General Mandatory Requirements of this RFP

These general Mandatory Requirements will first be confirmed by IDRC:

#	Mandatory Requirements
Mi.	Proposal was Signed
Mii.	Followed Inquiries Instructions
Miii.	Met submission close date and time
Miv.	Followed proposal delivery instructions
Mv.	Validity of proposal is same as RFP (90 Days)
Mvi.	Provided Conflict of Interest Statement
Mvii.	Provided Capacity to Perform Contract Statement
Mviii.	Provided Technical response as a separate file
Mix.	Provided Financial response as a separate file

PART 2: Statement of Work Mandatory Requirements

As stated in **Section 4.5.2 Response to the Statement of Work**, the Proponent **must provide detailed information relative to each and all mandatory requirements**. Indicate in the table, where in the Proponent's Proposal the response to the mandatory requirement can be found:

Example:

#	Mandatory Requirements	Compliant (yes or no)	Response
	Resources		
M1.	Lead Resource must be bilingual.	yes	See page 3, heading "xxxxx", paragraph 3 and 4.

Mandatory Requirements in Response to the Statement of Work:

#	Mandatory Requirements	Compliant (yes or no)	Response
M1.	Proponents must provide details about how the study will be carried out in each country, including who the research partners (if any) will be. It is anticipated that the study should generate 40		

	to 50 responses per country from a cross section of stakeholders, with the exception of India where the desired response is 80.		
M2.	Proposals must include Curriculum Vitae, as an attachment, of maximum two (2) pages per CV, for each team member.		
M3.	The proposed team must include individuals with proficiency in French and Spanish in order to effectively communicate verbally and in writing in the preferred language of the respondents.		
M4.	The Proposal must clearly indicate the linguistic capacity of each team member. It is essential that at least one member of the team has some level of Spanish and French communication skills. The report should indicate the level (Beginner, Intermediate, Advanced) for Reading, Writing and Oral for each language		
M5.	<p>As an attachment to the Proposal, proponents must include the description for one (1) project of a similar nature that has been successfully completed in East and West Africa, Latin America and Asia within the last five (5) years and involving at least one of the proposed team members. Proponents should provide information regarding:</p> <ul style="list-style-type: none"> - Project Title - Client Name - Duration, total level of effort and total value of project - Proponent's role and participation - Identification and role of members of the proposed project team who participated in the project. - Brief project description, including objectives, deliverables, unique approaches used and value added to client. 		

ANNEX C – Rated Requirements Checklist

INSTRUCTIONS:

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.

As stated in **Section 4.5.2 Response to the Statement of Work**, the Proponent **must provide detailed information relative to each Rated Requirement**. Indicate in the table, where in the Proponent's Proposal the response to the Rated Requirement can be found:

Example:

#	Rated Requirements	Response
	Resources	
R1.	Demonstrate the qualifications of the Lead Resource.	See page 18, Annex B, section 1.1

RATED REQUIREMENTS:

Rated Requirements in Response to the Statement of Work:

#	Rated Requirements	Weight	Response
	Proposal:	90	
R1.	demonstrates understanding of the assignment and requirements	30	
R2.	clearly lays out and provides enough detail on the approach and methodology for carrying out this assignment for the key activities including the implementation plan with level of effort (number of days) per activity	30	
R3.	presents an approach that responds to SoW.	30	
	Experience in:	120	
R4.	conducting large-scale surveys	30	
R5.	research design, management and data analysis	30	
R6.	conducting telephone and personal interviews in varying contexts	30	
	Understanding of/familiarity with the:	60	
R7.	policymaking processes in East and West Africa, Latin America and South and Southeast Asia	10	
R8.	the landscape of policymakers and other players in East and West Africa, Latin America and South and Southeast Asia	10	
R9.	the language requirements (English, French and Spanish) including implications of working in Francophone and Spanish speaking countries	10	

ANNEX D –Travel

Resulting Contract Travel Related Expenses

1. GENERAL

1.1 IDRC may pay for **travel expenses** incurred by a Consultant only when the expenses are directly related to the purposes for which the Consultant is engaged. All such travel expenses are reimbursed at cost.

1.2 Arrangements for visas, passports, immunization, and prophylaxis medication are the responsibility of the Consultant. **Costs** associated with these items are also the responsibility of the Consultant, *with the exception of visas*, which are included under the mobilization allowance provided to Consultants.

1.3 The Consultant retained by IDRC is responsible for the **cost of any insurance** he/she may wish to have in connection with travel undertaken in fulfilment of his/her commitments to. This applies to all types of insurance including, but not limited to, insurance in respect of death, bodily injury, permanent disability, medical, hospitalization and evacuation.

1.4 The **Consultant will not charge for travel time** to and from any work site, for any purpose. Cost of such time will be the sole responsibility of the Consultant.

2. TRAVEL UNDERTAKEN BY CONSULTANTS

Any travel details noted below that are applicable to a resulting Contract, will be fully outlined in the resulting Contract.

2.1 All Inclusive Per Diem Allowances

IDRC has a list of maximum all-inclusive per diem allowances that cover expenses for accommodation, meals, local taxis, laundry, local telephone calls, and gratuities by country. A Consultant may receive a per diem for each day or partial day of official travel, beginning the day after the departure.

Example (and subject to change):

For CANADA...CAD\$322 (taxes included)

2.2 Mobilization Allowances

IDRC may pay the Consultant a fixed amount to cover the cost of airport taxes, visas, and ground transportation to and from transportation drop off points.

Note:

Should the cost of visas largely exceed the allowance, the Consultant may be reimbursed for such expense upon submission of a claim accompanied by relevant original receipts.

Example (and subject to change):

The standard estimated mobilization allowance is CAD\$180 for domestic travel (within country or region, where a visa is not required) and CAD\$250 for international travel where a visa is required. Taxes are not included in the above mentioned amounts.

2.3 Transportation

IDRC makes a distinction between three (3) modes of transportation.

2.3.1 Air Travel

All Consultant's air travel must be prepaid by IDRC (through IDRC's Designated Travel Agency).

IDRC will arrange and pay for economy return airfares by the most economical and direct routing. Excursion fares are to be used whenever applicable. Rerouting, ticket upgrades, and personal stopovers are the personal responsibility of the Consultant.

2.3.2 Rail Travel

Where possible, rail travel must be prepaid by IDRC (through IDRC's Designated Travel Agency). Where the Consultant has arranged and paid for the rail tickets, reimbursement must be substantiated by appropriate original receipts and proof of purchase.

2.3.3 Other Types of Transportation

Other types of transportation expenses such as local public transportation services, car rental, and reimbursement of fuel to a host may be covered for the Consultant, at cost (and arranged by the Consultant).

Example (and subject to change):

Where the Consultant is authorized to travel by private automobile, he/she may be reimbursed at a rate of CAD\$0.575 per kilometer (taxes included).