



REQUEST FOR PROPOSAL (“RFP”)

RFP Title: IMCHA Formative Mid-term Evaluation	RFP #: 17180023
Issue Date: August 18, 2017	Close Date & Time: September 11, 2017 at 9:00:00 Eastern Daylight Time (EST)
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SECTION 1 – INTRODUCTION

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

1.1 IDRC OVERVIEW

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

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

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

1.2 PURPOSE OF THIS RFP

IDRC requests proposals for the provision of an evaluation consultant or group of consultants to undertake a mid-term formative evaluation, where requirements are described in section 2, the Statement of Work. The aim of the evaluation is to focus on the progress and draw general lessons to improve the Innovating for Maternal and Child Health (IMCHA) initiative.

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

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	August 18, 2017
Deadline for Enquiries	9:00am EDT, August 23, 2017
Tentative Deadline to Respond to Enquiries	August 25, 2017
RFP Close Date/Time	9:00.00am EDT, September 11, 2017
Tentative Evaluation, Selection, and Notification of Shortlisted Proponent(s)	September 22, 2017
Interviews/Presentations by Short-listed Proponent(s) if Required	September 27-28, 2017
Finalize Contract with Lead Proponent	October 5, 2017
Commencement of Services	October 15, 2017

SECTION 2 – STATEMENT OF WORK

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

2.1 BACKGROUND

The Innovating for Maternal and Child Health in Africa (IMCHA) initiative seeks to improve maternal, newborn and child health outcomes by strengthening health systems, using primary health care as an entry point.

IMCHA is a seven-year, multi-funder partnership with the Canadian Institutes of Health Research, Global Affairs Canada, and Canada's International Development Research Centre (IDRC). IMCHA was launched in 2014 with a budget of CA\$36 million.

The research program seeks to assist sub-Saharan African countries in resolving pressing health systems challenges to improve maternal, newborn and child health. The objective of IMCHA is to:

- address critical knowledge gaps and increase awareness among policy decision-makers about affordable, feasible, and scalable primary health care interventions to improve maternal and child health delivery and outcomes;
- build individual and institutional capacity for gender-sensitive health systems and solution-oriented research, and enhance the uptake of relevant and timely research that informs policy and practice; and
- strengthen collaborations between Canadian and African researchers, working in partnership with African decision-makers, to implement and scale up high-quality and effective services, and technologies that improve maternal and child health outcomes.

IMCHA is designed to support three separate but interrelated components. These components were finalized following a rigorous and competitive assessment and selection process. The components are:

Implementation Research Teams (IRTs)

Nineteen implementation research teams (IRTs) - composed of leading African and Canadian researchers and health policymakers- working in 10 countries to conduct implementation research to develop practical solutions to improve maternal and child health.

Health Policy and Research Organizations (HPROs)

Two independent policy organizations/consortia – referred to as Health Policy and Research Organizations (HPROs) (one in West Africa and one in East Africa) – and Two Health Policy and

Research Organizations (HPROs) to complement the IRT efforts to integrate the evidence they generate into policies and practices in maternal and child health in the targeted countries.

Synergy grants

Nine synergy grants (selected from the 19 IRTs) to scale-up of promising interventions and to address the unmet needs of a wider range of maternal and child health services including family planning and adolescent health, promotion of sexual and reproductive health services and information.

The research program focuses on four priority research themes:

- high impact community based maternal, newborn and child health interventions;
- quality facility based maternal, newborn and child health interventions;
- policy environment to improve maternal, newborn and child health care services and outcomes; and
- human resources for maternal, newborn and child health.

The initiative works across sub-Saharan Africa target countries: Ethiopia, Malawi, Mali, Mozambique, Nigeria, Senegal, South Sudan, and Tanzania. Some research projects have a multi-country focus, which has extended the reach of IMCHA to three additional countries (Burkina Faso, Kenya and Uganda).

2.2 DESCRIPTION AND SCOPE OF WORK

2.2.1 Project Scope

2.2.1.1 Purpose

The primary purpose of this mid-term evaluation is to examine various dimensions of IMCHA research and implementation in order to inform program implementation until the end of the initiative as well as future activities. The evaluation will focus on certain areas of IMCHA's Performance Measurement Framework (PMF). The evaluation will complement other monitoring activities by IDRC to report on the PMF progress.

The primary users of this evaluation are IDRC and the other IMCHA donor partners. Secondary users are IMCHA researchers, and other external stakeholders such as research organizations and research funders working on and in IMCHA focus areas and contexts.

2.2.1.2 Evaluation Questions

A. Integrity in the design of the IMCHA model: How has the IMCHA design been operationalized, relative to the purpose and objectives of the program?

- How well have the vision and objectives of IMCHA been operationalized and the extent to which the operationalization will facilitate program success? ^[1]
- What elements are helping or hindering the collaboration between researchers and African decision-makers regarding policy uptake objective of IMCHA? ^[2]
- What is the quality of collaboration between the Principal Investigator and the Canadian Co-Principal Investigator for the research teams and how has this collaboration affected progress toward the objectives of the projects?
- How is IMCHA aligned with the priorities of the donor partners CIHR and GAC? How could the elements of the partnership between CIHR, GAC, and IDRC be strengthened for wider impact?

B. Integration of gender/equity dimensions: How are the components of the IMCHA initiative addressing equity-sensitive and gender dimensions at the current state of implementation?

- How are the IMCHA IRTs and synergy grants integrating gender and equity dimensions?¹ What strategies are proving successful, and why? Which were are not, and why?
- How are HPROs contributing to strengthening the capacity of IRTs for integration of gender and equity dimensions, if at all? What strategies have they employed and what has been their effect?

C. Innovation and scaling: How has the focus on innovation and scale been articulated in the research projects of IMCHA?

- How is the focus on testing and promoting innovation being articulated in the research projects? Are the processes in place in each of the projects to successfully translate the findings into policies and practices?
- What have been the approaches for scaling up for each research intervention? What have been some of the hindering or supporting factors?

^[1] Reference to the recommendations of the HPRO survey from May/June 2016 with validation in September 2016 and reference indicator in IMCHA Performance Measurement Framework: 100.2 Proportion of recommendations from formative analysis of HPROs acted upon.

^[2] Reference indicator in IMCHA Performance Measurement Framework: 2.1 Number of total projects per country that demonstrate high level of collaboration with decision maker (documented by project, country and regional levels).

¹ Reference indicator in IMCHA Performance Measurement Framework: 1.1 Proportion of total projects that have at least 75 % (three of four processes) adequate gender and equity dimensions

D. Program delivery: How is the implementation of IMCHA being facilitated by IDRC, relative to the purpose and objectives?

- What mechanisms and strategies have been put in place for project-level and program-wide supervision and monitoring?
- What mechanisms and strategies exist and/or have been used for sufficient learning to ensure that the operationalization of the design is rolling out in the most effective and efficient way possible?

2.2.1.3 Methodology

The proposed evaluation methodology will ultimately be judged based on its suitability for addressing the evaluation questions. However, it should employ mixed data collection methods and data sources. One source to be considered will be data already collected by IMCHA as a part of other management activities.

IMCHA expects that the methodology will include the following elements, although we invite proponents to propose modified approaches that, in their view, would yield more relevant and / or accurate findings:

- **Document Review:** To include but not be limited to: Review of IMCHA core documents (call for proposals document, research uptake strategies, etc.); Review of IMCHA project documentation including program workplan, project proposals, grantee technical reports, IDRC project monitoring reports; IMCHA logic model and performance measurement framework (PMF) and data collected against the PMF; IMCHA annual reports to donor partners; review of past CIHR-GAC-IDRC Global Health program evaluations; and any interim and/or final research and research uptake products available during the timeframe of this review.
- **Interviews:** with IMCHA grantees, IDRC staff, CIHR and GAC focal points (current and previous) and other key external stakeholders.
- **Surveys or other data collection methods:** to solicit input from IMCHA projects as well as additional stakeholders both internal and external to IMCHA.
- **Sampling Framework:** Proponents are expected to cover the entire IMCHA program to date as well as the 19 IRTs, 2 HPROs and 9 Synergy projects. However the proponents can recommend a narrower scope in the evaluation design and work plan (for specific evaluation questions) if it includes an appropriate sampling framework that is approved by IDRC.

2.2.1.4 Tasks and Responsibilities

- The Proponent will produce an evaluation design report. This report will include: the evaluation questions to be addressed, the methodology to be implemented, a,

work plan including a schedule of expected dates, and a framework (cross-listing questions, methods and data sources) which will be shared with and approved by IDRC.

- The Proponent will engage in data collection and analysis, including field work (if required), as outlined in the evaluation design.
- The Proponent will produce an outline of the key sections of the evaluation report, for feedback and approval by IDRC.
- The Proponent will then produce a presentation of preliminary findings/draft evaluation report and present to IDRC and other IMCHA donor partners for review and discussion.
- The findings will then be finalized and a final evaluation report will be submitted to IDRC. The report should be a maximum of 25 pages long (excluding annexes and executive summary). It should include an executive summary of up to four pages. The report should respond to the questions outlined above and incorporate feedback from IDRC on the draft evaluation report. The final evaluation report will be a publically accessible document.
- The Proponent will produce two Findings Briefs on particular areas of interest (each maximum of two pages). The Briefs will synthesize program-wide lessons learned emerging from the Evaluation Questions in Section 2.2.1.2. The areas of interest will be decided upon discussions during the presentation of preliminary findings to IDRC and other IMCHA donor partners.

The evaluation will be managed by IMCHA's senior program specialist Dr. Nafissatou Diop. IMCHA will: provide the relevant IMCHA documents, including program-level documents, project documentation and other documentation to the consultant as needed; facilitate contact with relevant grantees, staff at IDRC, other donors, and other relevant stakeholders; and will interact closely with the evaluator and provide input and feedback as needed.

2.2.1.5 Project Budget

The estimated budget for this project, NOT including travel costs, is CAD \$125,000.

2.2.1.6 Requirements and Timeline

Activity	Description	Milestone
Short listed proponents present their proposals	Short listed proponents may be invited to present their proposal in detail before final decision	September 27-28, 2017
Submit an Evaluation workplan	Evaluation workplan and design documentation including methodology, evaluation framework and initial list of informants to be consulted	October 31, 2017

Submit a revised detailed Evaluation workplan	Modified based on feedback from IDRC	November 15, 2017
Presentation and Submit Draft report	Present preliminary findings to IDRC and donor partners and submit a draft report	May 31, 2018
Submit Final Evaluation Report	Final report 25 page maximum (excluding annexes) that responds to questions outlined in the Statement of Work and that incorporates feedback from IDRC and executive summary (no more than 4 pages)	June 15, 2018

2.2.1.7 IDRC RESPONSIBILITIES, SUPPORT, AND REPRESENTATIVES

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

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

IDRC will identify a **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, answer questions on terms and conditions, and manage the receipt and payment of invoices.

2.2.1.8 LOCATION OF WORK AND TRAVEL

Work is expected to take place primarily at the Proponent's site.

Travel will be required by the proponent, and will be coordinated with IDRC's Project Authority.

Travel expenses must **NOT** be included in price estimates as IDRC will provide standard per-diem rates, and will procure all air tickets directly through its designated travel agency.

2.2.1.9 DURATION / PERIOD OF A RESULTING CONTRACT

A resulting Contract is expected to be for a period of approximately eight (8) months, ending June 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 and the selected evaluation team will conduct the evaluation of proposals in the following 5 (5) stages:

3.2.1. Stage I

Stage I will consist of a review to determine which proposals comply with all of the mandatory requirements

3.2.2. Stage II

Stage II will consist of a scoring by IDRC and the selected evaluation team of each qualified proposal on the basis of the rated criteria.

3.2.3. Stage III

IDRC reserves the right to short-list and request presentations from those proponents that, in the sole opinion of IDRC, can best meet the requirements as identified in the Request for Proposal.

Short-listed Proponents may be asked to respond to question(s) or make a presentation on their proposal and must be prepared to respond and discuss any area of the Proposal within 5 business days of notification.

3.2.4. Stage IV

Upon completion of Stage III for all shortlisted Proponents, the Financial Proposal provided as a separate file by each Proponent in their Electronic Bid Submission will then be opened and Stage IV will consist of a scoring of the pricing submitted. The evaluation of price/cost shall be undertaken after the evaluation of mandatory requirements and any rated requirements has been completed.

3.2.5. Cumulative Score

At the conclusion of Stage IV, all scores from Stage II and Stage IV will be added and the highest scoring Proponent will be selected for contract negotiations.

3.2.1 Stage I: Evaluation of Mandatory Requirements

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

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

3.2.2 Stage II: Evaluation of 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.

3.2.3 Stage III: Evaluation of Proponent Presentations/Interviews

Proponents who have met all of the mandatory requirements and those who have placed first, second, and third for the rated requirements may be invited to present or interview or both to key IDRC staff (onsite, or through teleconference set up by IDRC) at their own expense. The presentation will be evaluated based on demonstrating an understanding and knowledge to deliver the project, and demonstrating the abilities, skills, and experiences of the project team. The interview/presentation is expected to last no longer than 30 minutes to 1 hour which includes questions and answers on 27-28 September 2017. Reasonable notice will be given to this shortlist with more details on the presentation process.

The following is an overview of the categories and weighting for the rated criteria of the RFP:

Section	Description	Weight/Score
3.2.2	Technical proposal (stage II)	50
3.2.3	Technical proposal (stage III)	25
	Total Weight/Score	75

IDRC may adjust the points allocated to each proponent in the evaluation.

3.2.4 Stage IV: Evaluation of Financials

Description	Weight/Score
Financial/Pricing	25
Total Weight/Score	25

The top three (3) compliant proposals will be shortlisted to move to on to the financial proposal review.

Financial Proposals will be scored based on a relative pricing formula. Each Proponent will receive a percentage of the total possible points arrived at by dividing that Proponent's total price by the lowest submitted total price. For example, if the lowest total price is \$120.00, that Proponent receives 100% of the possible points ($120/120 = 100\%$), a Proponent who submits \$150.00 receives 80% of the possible points ($120/150 = 80\%$), and a Proponent who submits \$240.00 receives 50% of the possible points ($120/240 = 50\%$).

Travel expenses will not be used for scoring.

3.2.6. Final Score

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

3.3 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.

3.4 PROPONENT SELECTION

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

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

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

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

SECTION 4 – PROPOSAL FORMAT

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

4.1 GENERAL

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

4.2 ORGANIZATION OF RESPONSES

Responses should be organized as follows, where the sections that follow (4.3, 4.4, and 4.5) provide more details:

Volume	Contents
1.0	Cover Letter
1.1	Technical proposal : Consisting of 2-page draft work plan summarizing the proposed methodology
1.2	CV(s)
2.0	Financial Proposal

Volumes 1.0, 1.1 and 1.2 must be submitted separately to Volume 2.0 (Technical Proposal). Volumes 1.0, 1.1 and 1.2 **must not** contain any financial information.

4.3 COVER LETTER

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

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

4.4 TECHNICAL PROPOSAL

In this section, the Proponent **must** provide detailed information relative to each requirement listed in the Statement of Work (refer to Section 2) and clearly outline the work that the Proponent proposes to undertake for the provision of these services to IDRC.

It is suggested that the Proponent follow the format outlined below for its technical proposal.

4.4.1 Table of Contents

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

4.4.2 General

In this section, the Proponent **must** provide detailed information relative to each requirement listed in the Statement of Work, 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.

It is suggested that the Proponent follow the format outlined below 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)

4.4.3 Response to the Statement of Work

A	Mandatory Requirements	M
1	<p>Executive Summary</p> <p>The Proponent shall include a short executive summary (maximum 1 page) highlighting the following:</p> <p>a. a description of:</p> <ul style="list-style-type: none"> • the Proponent’s business and specializations • the location of its head office and other offices (specify city and province/state only) • details of any sub-contracting arrangements to be proposed 	M

	b. a brief summary of what makes the Proponent's organization/team stand out from its competitors	
2	<p>All Proposed Resources</p> <p>The Proponent shall outline all proposed resources, including roles and responsibilities, to be used in providing the services and include:</p> <p>a. name, title, telephone #, email address, location; and</p> <p>b. CV (s) - maximum 6 pages for each.</p>	M
3	<p>Similar Services- Demonstrate</p> <p>In order to demonstrate that the Proponent has completed similar services, the Proponent's response must include minimum one (1) up to maximum three (3) examples of similar services. Maximum length for each example is two pages.</p> <p>For each example, the following should be provided:</p> <p>a. name and address (city and province only) of the client;</p> <p>b. services period, e.g. start and end dates; and</p> <p>c. brief description of services provided by the Proponent.</p> <p>d. name and contact information of client's main contact for this contract</p> <p>In addition, the examples demonstrate:</p> <p>e. The ability to engage and excel in an iterative work process</p> <p>f. The ability to give and receive constructive feedback</p> <p>g. Excellent oral and written communication skills in English</p>	M

B	Personnel Profile and Experience	Rating	Total Points 25
1	In order to demonstrate that the Proponent has completed similar services requested in the Statement of Work, and as specified within Section 2, the Proponent must have the following skills and experience :	M	
a)	Sound understanding of the constraints of conducting research in low and middle income countries, particularly across sub-Saharan Africa	MR	3
b)	Proven strong report writing and presentation skills, ability to communicate complex technical ideas using non-technical language to diverse audiences	MR	3
c)	Experience evaluating research which integrates meaningful gender and equity analysis in the design, implementation and communication	MR	5
d)	Basic knowledge of existing evidence on the links between health systems and maternal and child health as well as literature in implementation science, and ability to reflect on relevance of emerging research findings within the broader field of maternal and child health	MR	5
e)	Specialist knowledge of the research methods (randomized control trials, a range of qualitative methods) used for implementation	MR	5

	research and practical knowledge of data collection, combining qualitative and quantitative analysis		
f)	Knowledge of program level evaluation of research and innovations and policy uptake for development		4

C	Proposed Evaluation Approach	Rating	Total Points 25
1	The Proponent should demonstrate its Approach to successfully deliver the requirements detailed Section 2 - Statement of Work.		
a)	Methodology: <ul style="list-style-type: none"> description of sources of data and how they will be used; outline of an initial analytical framework; feasibility of design; references made to relevant literature and evaluation design approaches; a detailed timeline (including proposed travel); and 	R	20
b)	<i>Risk Management Plan</i> - Describe any contingencies that may hinder the progress or outcome of the evaluation and suggest how you would mitigate them.	R	5

D	Stage III Interview	Rating	Total Points 25
1	Stage III Presentation – Does the proponent an understanding and knowledge to deliver the project, and sufficiently demonstrate the abilities, skills, and experiences of the project team, the proposed evaluation approach and risk management plan		25

4.5 FINANCIAL PROPOSAL

4.5.1 General

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

4.5.2 Financial Requirements

The Proponent must submit a Financial Proposal including a cost summary of the Services as follows:

Requirements	Total Points 25
a. The Proponent is to state the assumptions underlying its financial proposal.	

b. All prices are to be quoted in Canadian dollars (CAD) and be exclusive of the Goods and services Tax (GST) or Harmonized Sales Tax (HST).

The GST or HST, whichever is applicable, shall be extra to the prices quoted by the Proponent and will be paid by IDRC.

If the Proponent will not be charging IDRC taxes, an explanation should be provided.

See the **NOTES** below for more details on taxes.

All prices must include a detailed breakdown and include at a minimum the following:

- 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 day to be spent in at IDRC's Ottawa office, if applicable.

Each requirement should outline the timeline being proposed with daily rates provided per resource.

Prices shall include all components normally included in providing the proposed services such as professional fees, disbursements, engagement support expenses, etc.

Travel expenses must NOT be included in price estimates as IDRC will provide standard per-diem rates, and will procure all air (and train) tickets directly through its designated travel agency (reference Annex **B** for more details).

d. The Proponent shall propose an invoicing schedule if other than providing one (1) invoice upon completion of all Services.

Important Note: IDRC's payment terms are NET 30 and IDRC will make no advance on fees.

NOTES:

1. Taxes

1.1 Proponents 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 payable by IDRC.

1.2 In accordance with the income tax regulations of Canada, IDRC must withhold 15% of fees and non-exempt expenses of **non-resident Proponents working in Canada** for transmittal to the Canada Revenue Agency ("CRA"). Such holdback may be either waived by the Canada Revenue Agency ahead of payment (the Proponent must secure the waiver himself / herself) or refunded later to the Proponent by the authorities of his country of residence (where the country in question has a tax treaty with the Government of Canada), upon the Proponent 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 Proponent. Waiver applications and information can be found on CRA's website: <http://www.cra-arc.gc.ca/tx/nnrstdnts/cmmn/rndr/menu-eng.html>

1.3 In accordance with the tax regulations of the jurisdictions of IDRC's Regional Offices, other tax regulations may apply.

4.5.3 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 – RFP 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 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 after 9:00am EDT, August 23, 2017 in order to receive a response prior to the close date. **When submitting, Proponents email subject line shall cite "RFP #17180023, IMCHA Formative Evaluation"**.

The Contracting Authority will provide simultaneously to all Proponents, all answers to significant enquiries received 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 provided **by email** to each Proponent to whom IDRC has issued this RFP.

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 is electronic, **via** email, in Microsoft Word or in PDF format to the **Contracting Authority** named on page 1. **Proponents email subject line should cite "RFP # 17180023, IMCHA Formative Evaluation for Mid Term Review"** when submitting.

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

5.3.3 Changes to Submission

Changes to the submitted proposal can be made, if required, provided they are received as an Addendum (or an Amendment) to, or clarification of, previously submitted proposal, or as a complete new proposal to cancel and supersede the earlier proposal. The addendum, clarification, or new proposal shall 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 RIGHTS OF IDRC

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

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

Without limiting the foregoing, IDRC reserves the right to:

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

5.9 PROPOSED CONTRACT

5.9.1 Resulting Contract

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

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

5.9.2 Income Tax Reporting Requirement

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

ANNEX A – Resulting Contract Terms and Conditions

Click on the below icon to review the Terms and Conditions for a resulting Contract:
Note: if you have difficulty opening the PDF document, please contact the Contracting Authority.



template_Consulting TandCs.docx

ANNEX B –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.

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).

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 4.4.3 Response to the Statement of Work**, the Proponent **must provide detailed information relative to each requirement**.

Also when responding to each requirement, the Proponent must identify in the “Response” column, if the service/process falls into one of the following categories:

- If the service/process is not currently being offered to other clients;
- If the service/process is not currently being offered to other clients but will be developed and offered to all clients;
- If the service/process is not currently being offered to other clients but will be developed for IDRC only;
- If the service/process is currently offered on a customized basis to other clients and will also be offered on a customized basis to IDRC.

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

	Mandatory Requirements	Compliant (yes or no)	Response
A	Company Information		
M1.	Executive Summary (Max 1 Page) which includes:		
M1a	a description of: <ul style="list-style-type: none"> • the Proponent’s business and specializations • the location of its head office and other offices (specify city and province only) • details of any sub-contracting arrangements to be proposed 		
M1b.	a brief summary of what makes the Proponent’s organization/team stand out from its competitors		
	Proposed Resources Information		

M2.	The Proponent shall outline all proposed resources to be used in providing the services and include:		
M2a	name, title, telephone #, email address, location; and		
M2b	CV (s) - maximum 6 pages for each.		
	Similar Services - Demonstrate		
M3.	In order to demonstrate that the Proponent has completed similar services , the Proponent's response must include minimum one (1) up to maximum three (3) of similar services. For each example, the following should be provided:		
M3a.	name and address (city and province only) of the client;		
M3b	services period, e.g. start and end dates		
M3c	brief description of services provided by the Proponent, and		
M3d	name and contact information of client's main contact for this contract		
	In addition, the examples demonstrate:		
M3e	e. The ability to engage and excel in an iterative work process		
M3f	f. The ability to give and receive constructive feedback		
M3g	g. Excellent oral and written communication skills in English		
B	Personnel Profile and Experience		
M4	In order to demonstrate that the Proponent has completed similar services requested in the Statement of Work, and as specified within Section 2, the Proponent must have the following skills and experience :		
M4a	Experience working in multi-cultural, multi-disciplinary context		
M4b	Proven strong report writing and presentation skills		

M4c	Ability to communicate complex technical ideas using non-technical language to diverse audiences		
M4d	Sound understanding of the constraints of conducting research in low and middle income countries, particularly across sub-Saharan Africa		
M4e	Experience evaluating research which integrates meaningful gender and equity analysis in the design, implementation and communication		
M4f	Basic knowledge of existing evidence on the links between health systems and maternal and child health as well as literature in implementation science, and ability to reflect on relevance of emerging research findings within the broader field of maternal and child health		
M4g	Knowledge of program level evaluation of research and innovations and policy uptake for development		
M4h	Specialist knowledge of the research methods (randomized control trials, a range of qualitative methods) used for implementation research		

ANNEX D – Rated Requirements Checklist

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

As stated in **Section 4.4.3 Response to the Statement of Work**, the Proponent **must provide detailed information relative to each requirement.**

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

	Rated Requirements	Response
	Personnel Profile and Experience	
R1.	In order to demonstrate that the Proponent has completed similar services requested in the Statement of Work, and as specified within Section 2, the Proponent must have the following skills and experience :	
R1a.	Experience working in multi-cultural, multi-disciplinary context	
R1b	Proven strong report writing and presentation skills	
R1c	Ability to communicate complex technical ideas using non-technical language to diverse audiences	
R1d	Sound understanding of the constraints of conducting research in low and middle income countries, particularly across sub-Saharan Africa	
R1d	Experience evaluating research which integrates meaningful gender and equity analysis in the design, implementation and communication	
R1e	Basic knowledge of existing evidence on the links between health systems and maternal and child health as well as literature in implementation science, and ability to reflect on relevance of emerging research findings within the broader field of maternal and child health	
R1f	Knowledge of program level evaluation of research and innovations and policy uptake for development	
R1g	Specialist knowledge of the research methods (randomized control trials, a range of qualitative methods) used for implementation research	
R1h	Practical knowledge of data collection, combining qualitative and quantitative analysis	
	Proposed Evaluation Approach	

R2.	The Proponent should demonstrate its Approach to successfully deliver the requirements detailed Section 2 - Statement of Work.	
R2a.	Methodology: <ul style="list-style-type: none">• description of sources of data and how they will be used;• outline of an initial analytical framework;• feasibility of design;• references made to relevant literature and evaluation design approaches;• a detailed timeline (including proposed travel); and	
R2b.	<i>Risk Management Plan</i> - Describe any contingencies that may hinder the progress or outcome of the evaluation and suggest how you would mitigate them.	