



REQUEST FOR PROPOSAL (“RFP”)

RFP #: 19200012	RFP Title: Innovating for Maternal and Child Health in Africa (IMCHA) Summative Evaluation
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SECTION 1 – INTRODUCTION

The purpose of this section is to provide general information about the International Development Research Centre (“IDRC” or “Centre”) 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 375 people at the head office located in Ottawa, Canada and in four (4) regional offices located in New Delhi-India, Montevideo-Uruguay, Amman-Jordan, Nairobi-Kenya. 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

IDRC requests proposals for a consultant or group of consultants to conduct an external summative evaluation of the Innovating for Maternal and Child Health in Africa (IMCHA) Initiative, where requirements are described in section 2, the Statement of Work (“Services”).

1.3 DOCUMENTS FOR THIS RFP

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

- This RFP document
- Annex A – Resulting Contract Terms and Conditions

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, selection, and notification of Lead Proponent	October 2019
Interviews/Presentations by short-listed Proponent(s)	October 2019
Finalize Contract with Lead Proponent	October 2019
Commencement of Services	October 2019

SECTION 2 – STATEMENT OF WORK

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

2.1 INTRODUCTION AND PROJECT OVERVIEW

The Innovating for Maternal and Child Health in Africa (IMCHA) Initiative seeks to improve maternal, newborn and child health (MNCH) outcomes by strengthening health systems, using primary health care as an entry point. It is a seven-year partnership between the Canadian Institutes of Health Research (CIHR), Global Affairs Canada (GAC), and Canada's International Development Research Centre (IDRC). IMCHA was launched in 2014 with a budget of CA\$36 million. It will end on December 31, 2020.

The IMCHA model is comprised of 19 Research Teams (RTs) and two African regional health policy and research organizations (HPROs). The research teams, composed of leading African researchers as Principal Investigators (PI), along with Canadian researchers and African Decision-makers as co-PIs have tested practical solutions to health system challenges, generating new knowledge to ensure that mothers and their children have better access to quality care they need. The RTs have also explored how successes can be scaled up to improve health equity for women and children across priority research themes including i) high impact, community-based interventions; ii) quality facility-based interventions; iii) enabling the policy environment to improve healthcare services and outcomes; and iv) human resources for health. The HPROs lead capacity building and knowledge translation efforts in collaboration with the research teams. They foster uptake of research findings by high-level policymakers to ensure that evidence informs decision-making and strengthens health systems. All 19 RTs received an original grant. In addition, nine RTs were awarded a Synergy Grant on a competitive basis, for a total of 28 research projects conducted by the 19 RTs.

The IMCHA management team is composed of a dedicated core team and several Program Officers within the Maternal and Child Health (MCH) Program at IDRC. The governance structure of the partnership consists of a Governance Committee and a Management and Operations (M&O) Committee. With representation from the three partner organizations, the role of the Governance Committee is to focus on strategic decision-making. The role of the M&O Committee is to conduct ongoing oversight of the progress of IMCHA and explore synergies to promote the communication and use of the findings from IMCHA.

2.2 DESCRIPTION AND SCOPE OF WORK

2.2.1 Project Scope

In Scope:

The purpose of the evaluation is to assess the overall performance of the Initiative and the value-added of its design and delivery. The evaluation will complement other monitoring activities conducted by the IMCHA management team to report on the Performance Measurement Framework (PMF)¹.

¹ IMCHA Program Officers work closely with the research teams and HPROs, and further interact with each based on the content on their Technical Reports. In addition, the POs conduct project monitoring visits and field visits. Also, IMCHA submit an annual report to donor partner GAC as per the Grant Agreement. This report includes, among other things, a report on the Outputs identified in the PMF. Therefore, the questions below relate to the immediate, intermediate and ultimate outcomes from the PMF that are not captured through the technical reports

2.2.2 Specific Objectives

The specific objectives are as follows:

1. To examine IMCHA performance in relation to the PMF, in particular progress made towards achieving the immediate, intermediate and ultimate outcomes.
2. To evaluate how the recommendations of the mid-term evaluation were addressed and what difference they made in IMCHA achievements.
3. To assess IMCHA management, and the value added by the initiative.
4. To inform future partnerships and undertakings.
5. To evaluate how the work conducted under IMCHA is being documented for contributing to the legacy of the Initiative.

2.2.3 Intended Users of the evaluation

Primary Users:

- IMCHA management team
- IMCHA governance structure (Governance Committee and M&O committee – including all funding partners IDRC, GAC and CIHR)

Secondary users:

- IMCHA grantees: (RTs and HPROs)
- Other external stakeholders, such as research organizations and donors, interested in the IMCHA model to improve MCH and/or working in similar settings
- Policy makers and program managers in Canada and all participating countries

2.2.4 Evaluation Questions

1. **Performance of the Initiative: What are the achievements of IMCHA with regard to the Performance Measurement Framework (in particular in terms of immediate, intermediate and ultimate outcomes) as well as policy uptake and scale up of successful interventions (triangulation of evidence from IMCHA databases based on technical reports received and on field visits)²?**

A. Improved maternal newborn and child health outcomes in targeted countries³

- What are the achievements of IMCHA in relation to the eleven indicators on MNCHⁱ? (Provide data in relation to the baseline and target identified in the PMF for the indicator *“Proportion of funded implementation research that improved maternal and child health outcomes and access to primary health care services”*).
- What, if any, outcomes have been achieved that were not predicted in the PMF or IMCHA Logic Model [PROMPT FOR GENDER-RELATED OUTCOMES IN PARTICULAR]?

² The titles of the sections A-G are the names taken from the PMF for those outcomes in order to make a clear connection between the question here and the PMF outcome to document.

³ IMCHA PMF ultimate outcome. This is the name of the outcome in the PMF and IMCHA Logic Model. However, the indicator focused on *“improved maternal and child health outcomes and access to primary health care services”*.

- What have been the main strategies to obtain these achievements? And how appropriate are they for achieving the intended outcomes?

B. Enhanced production, analyses and syntheses of health systems implementation research prioritizing gender and equity⁴

Expressed in data, assess progress on *indicators 1.1 “Proportion of total projects that have at least 75% (three of four processes) adequate gender and equity dimensions” and 1.2 “Proportion of health systems research outputs and syntheses that is gender and equity focused”* in relation to the baseline/targets identified in PMF.

Integration of gender dimension?

- How have the IMCHA RTs integrated gender dimensions? What strategies have been used? Which ones have proven successful, and why? Which ones have not, and why? What have been helping or hindering factors?
- How have the HPROs contributed to the integration of gender in the research projects’ activities, capacity building, and knowledge translation? What strategies have been used? Which ones have proven successful, and why? Which ones have not, and why? What have been helping or hindering factors?
- How has the IMCHA management team contributed to this integration?
- How have the recommendations from the mid-term evaluation influenced this integration?

Integration of equity dimension?

- How did the IMCHA RTs integrate equity dimensions? What strategies were used? Which ones have been proven successful, and why? Which ones have not, and why?
- How did the HPROs contribute to the integration of equity in the research projects’ activities, capacity building, and knowledge translation? What strategies have been used? Which ones have proven successful, and why? Which ones have not, and why? What have been helping or hindering factors?
- How has the IMCHA management team contributed to this integration?
- How have the recommendations from the mid-term evaluation influenced this integration?

The mid-term evaluation highlighted some confusions between the concepts of “gender” and “equity”. Has there been any change in the understanding of these concepts since then? If yes, what has changed, and what has contributed to this change?

What, if any, outcomes have been achieved that were not predicted in the PMF or IMCHA Logic Model?

⁴ IMCHA PMF intermediate outcome #1

C. Enhanced partnering and collaboration between decision makers and researchers on health systems strengthening in the selected countries/regions⁵

Expressed in data, assess progress on *indicator 2.1 “Number of total projects per country that demonstrate high level of collaboration with decision maker (documented by project, country and regional levels)”* in relation to the baseline/target identified in PMF.

- How have RTs and/or HPROs demonstrated collaboration with decision makers, and at what level of decision making (overall, by project, and at country and regional levels)⁶? What have been helping or hindering factors?
- How has the IMCHA management team contributed to this work?
- How did the recommendations from the mid-term evaluation influence this work?
- What, if any, outcomes have been achieved that were not predicted in the PMF or IMCHA Logic Model [PROMPT FOR GENDER-RELATED OUTCOMES IN PARTICULAR]?

D. Enhanced integration of health systems research findings into primary health care policies and practice in the selected countries⁷ & scale up

Expressed in data, assess progress on *indicator 3.1 “Number (type) of influence of IMCHA research projects on policy and programming per project”* in relation to the baseline/target identified in PMF.

- How have RTs and/or HPROs demonstrated influence on policy and programming (overall, by project, and at country and regional levels)⁸? What have been helping or hindering factors?
- How have RTs and HPROs been scaling? What have been helping or hindering factors?
- How has the IMCHA management team contributed to this work?
- How did the recommendations from the mid-term evaluation influence this work?
- What, if any, outcomes have been achieved that were not predicted in the PMF or IMCHA Logic Model [PROMPT FOR GENDER-RELATED OUTCOMES IN PARTICULAR]

E. Strengthened capacity of researchers and research organizations to conduct gender and equity informed implementation research⁹

Expressed in data, assess progress on *indicator 100.2 “Proportion of recommendations from formative analysis of HPROs acted upon”* in relation to the baseline/target identified in PMF.

- How have the HPROs acted upon the recommendations from the formative/situation analyses they conducted?
- What, if any, outcomes have been achieved that were not predicted in the PMF or IMCHA Logic Model [PROMPT FOR GENDER-RELATED OUTCOMES IN PARTICULAR]

⁵ IMCHA PMF intermediate outcome #2

⁶ IMCHA PMF indicator 2.1

⁷ IMCHA PMF intermediate outcome #3

⁸ IMCHA PMF indicator 3.1

⁹ IMCHA PMF immediate outcome #100. Indicator 100.1 is addressed under question B above. The question here relates to indicator 100.2

F. Strengthened partnerships and alliances between African researchers, decision-makers and Canadian researchers¹⁰

- Since the midterm evaluation, how has the collaboration between African and Canadian researchers evolved? What factors are helping this collaboration? Why is that? What factors are hindering the collaboration? Why is that? How have these factors been addressed?
- How has the collaboration between researchers and African decision-makers evolved? What factors are helping this collaboration? Why is that? What factors are hindering the collaboration? Why is that? How have these factors been addressed?
- What, if any, outcomes have been achieved that were not predicted in the PMF or IMCHA Logic Model [PROMPT FOR GENDER-RELATED OUTCOMES IN PARTICULAR]?

G. Increased awareness and undertaking of research evidence by decision makers at the primary healthcare level¹¹

- How have recommendations from IMCHA research been communicated to the project co-PI decision maker? How has the co-PI decision maker used this information?
- What, if any, outcomes have been achieved that were not predicted in the PMF or IMCHA Logic Model [PROMPT FOR GENDER-RELATED OUTCOMES IN PARTICULAR]?

2. Assessment of the IMCHA management: how effective has the management of the Initiative been and what difference has that made to IMCHA achievements?

- How has the support from the management team contributed to the efforts of the RTs, the HPROs, and the Initiative overall?
- How has the IMCHA management team implemented the recommendations of the mid-term? What difference has this made in IMCHA achievements?
- [Only for IMCHA donor partners] How has the Management and Operations Committee influenced IMCHA management and achievements?

3. Assessment of the value-added of the IMCHA Initiative (building up on findings from the mid-term evaluation, and focusing on findings for the period thereafter: How well has IMCHA been operationalized and how could it be improved on in future undertakings)? How can the evaluation inform the design of the IMCHA model for future undertakings?

- How did the IMCHA model contribute to the performance of the initiative? What new lessons can be learned regarding the design and implementation of the model of the RTs (African PIs and Canadian researcher co-PIs and African Decision-maker co-PI)? What new lessons can be learned regarding the design and implementation of the model of HPROs? What new lessons can be learned regarding the collaboration between research teams and HPROs? How could the IMCHA model be improved on when designing future initiatives?

¹⁰ IMCHA PMF immediate outcome #200

¹¹ IMCHA PMF immediate outcome #300

- The Synergy Grants are also an opportunity for RTs to expand on their original grant, explore new (but related) issues and/or engage in scale-up: What worked well in the Synergy Grants? What were the challenges? How could this be improved on in a future Initiative?
- What are other recommendations for designing any such future initiative?
- [Only for IMCHA donor partners] What new lessons can be learned regarding the design and implementation of the partnership between CIHR, GAC and IDRC? How relevant would an initiative such as IMCHA continue to be to address your need and alignment with the Government of Canada and your own organizational priorities? How could a similar donor partnership be strengthened in designing such future initiative?

4. To evaluate how the work conducted under IMCHA is being documented for contributing to the legacy of the Initiative

- How have the RTs and HPROs documented their work, beyond publications, indicators performance and impacts, to contribute to IMCHA legacy? How could this be improved on in a future Initiative?
- How has the IMCHA management team documented the work of IMCHA, beyond publications, indicators performance and impacts, to contribute to the legacy of the Initiative? How could this be improved on in a future Initiative?
- [Only for IMCHA donor partners] How have the 3 donor partners documented the work of IMCHA, beyond publications, indicators performance and impacts, to contribute to the legacy of the Initiative? How could this be improved on in a future Initiative?

2.2.5 Methodology

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

IMCHA expects that the methodology will include the following components, although we invite proponents to propose other valid approaches that, in their view, would yield informative findings:

- **Document Review:** to include but not be limited to: IMCHA core documents (calls for proposals, workplan, logic model, documents analysing performance against the PMF, mid-term evaluation report and other outputs, etc.); IMCHA grantees documents (abstracts, technical reports, impact statements, and IDRC projects monitoring visit reports and relevant trip reports); IMCHA annual reports to donor partner GAC; and any other available capacity building, knowledge translation and research uptake products.
- **Quantitative data collection/analysis:** The consultants will conduct an online survey to solicit input from all Principal Investigators (PIs) and co-PIs. The consultants will also have access to IMCHA databases compiling information gathered from the Technical Reports.
- **Qualitative data collection/analysis:** The consultants will conduct in-depth interviews to solicit perspectives from IMCHA grantees, IMCHA management team and other relevant IDRC staff, CIHR and GAC focal points (and others as specified), and other key external stakeholders. If possible, the

consultants will also solicit perspectives from beneficiaries of the projects (communities, human resources for health, decision makers and other stakeholders) through interviews and/or focus group discussions.

- **Scope:** Proponents are expected to cover the entire IMCHA Initiative, including the 2 HPROs and 28 research projects (composed of the 19 original Implementation Research Teams and 9 Synergy grants).

Proponents will provide an overview of the limitations of their proposed approach and articulate mitigation strategies.

2.2.6 Tasks and Responsibilities

- Proponents 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 proponents should also submit a plan of proposed travels for fieldwork.
- Proponents will engage in data collection and analysis as outlined in the evaluation design.
- Proponents will produce an outline of the key sections of the evaluation report, for feedback and approval by IDRC. The report should respond to the questions outlined above and include a summary table displaying progress data on each PMF indicator for the immediate (with the exception of 200.1 and 300.1), intermediate, and ultimate outcomes.
- Proponents will produce a presentation of preliminary findings and present to IMCHA donor partners for review, sense-making and discussion
- Proponents will produce a draft evaluation report for review by the IMCHA donor partners. The report should take into account observations from the presentation of the preliminary findings.
- Proponents will integrate feedback received and produce a revised report. After review by the IMCHA partners, and possible additional revisions, the final report will be submitted to IDRC. The report should be a maximum of 25 pages (excluding annexes and executive summary). It should include an executive summary in English and French. The final evaluation report will be a publicly accessible document.
- Proponents will also produce two Issue Briefs on specific areas of interest (each maximum of four pages). The Briefs will synthesize IMCHA-wide lessons learned from the Evaluation Questions. The areas of interest will be decided upon discussions during the presentation of preliminary findings to IDRC and donor partners.

IMCHA will: provide relevant documentation, including core documents, projects documentation and other products to the consultant as needed; facilitate contact with grantees, staff at IDRC and donor partners, and other relevant stakeholders; and will interact closely with the consultants and provide input and feedback as needed.

¹ From the PMF, the 11 indicators on MNCH from Commission on Information and Accountability are:

1. Maternal mortality Ratio (deaths per 100,000 live births)

2. Under five child mortality, with the proportion of newborn deaths (deaths per 1000 live births)
3. Children under five who are stunted (percentage of children under five years of age whose height for age is below minus two standard deviations from the median of the WHO Child Growth Standard)
4. Met need for contraception (proportion of women aged 15-49 who are married or in union and who have met their need for family planning, i.e. who do not want any more children or want to wait at least two years before having a baby, and are using contraception).
5. Antenatal care coverage (percentage of women aged 15-49 with a live birth who received antenatal care by a skilled health provider at least four times during pregnancy)
6. Antiretroviral prophylaxis among HIV-positive pregnant women to prevent vertical transmission of HIV, and antiretroviral therapy for women who are treatment-eligible
7. Skilled attendant at birth (percentage of live births attended by skilled health personnel)
8. Postnatal care for mothers/babies (percentage of mothers and babies who receive 1st visit within 2 days of birth)
9. Exclusive breastfeeding for six months (percentage of infants aged 0-5 months who are exclusively breastfed)
10. Three doses of the combined diphtheria/pertussis/tetanus vaccine (percentage of infants aged 12-23 months who received three doses of DPT vaccine)
11. Antibiotic treatment for pneumonia (percentage of children age 0-59 months with suspected pneumonia receiving antibiotics)

2.2.7 Project Timeline

Activity	Description	Milestone
Contract start	We anticipate that the contract will commence early October 2019	October 2019
Submit an Evaluation workplan	Evaluation workplan and design documentation including methodology, evaluation framework and initial list of informants to be consulted	October 31 st , 2019
Submit a revised detailed Evaluation workplan	Modified based on feedback from IDRC	November 15 th , 2019
Submission of draft Report and presentation to IDRC and partners	Present findings to IDRC and partners Submit draft report that responds to questions outlined in the Statement of Work Discussion on topics for Issue Briefs to be selected following presentation of preliminary findings	June 14 th , 2020
Feedback from IDRC and partners	IDRC and partners provide a consolidated compilation of their feedback on the report	July 15 th , 2020
Submit final Report	Final report, 25 pages maximum (excluding annexes), that incorporates feedback from IDRC and partners	August 16 th , 2020
Confirmation on Issue Briefs by IDRC and partners	Issue Briefs on selected following presentation of preliminary findings	June 21 st , 2020
Submission of draft Issue Briefs	Submit draft Issue Briefs on topics selected following presentation of preliminary findings	July 19 th , 2020
Feedback from IDRC and partners	IDRC and partners provide a consolidated compilation of their feedback on the Issue Briefs	August 19 th , 2020

Submit final Issue Briefs	Issue Briefs, 4 pages maximum each, that incorporate feedback from IDRC and partners	September 13, 2020
Dissemination events	Up to 4 dissemination events will be organized during which the consultants will present the findings of the evaluation and address questions. Location, audience and logistics to be determined in due course	August-September, 2020

2.2.8 Project Budget

The estimated budget for this project is CAD 150,000 excluding travel and taxes.

2.3 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.

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.

2.4 LOCATION OF WORK AND TRAVEL

Due to the type of Services required, the successful Proponent will be able to work from its own location. IDRC will not provide onsite facilities for the Proponent, other than providing facilities for on-site meetings.

Travel is expected to be required by the Proponent.

2.5 PERIOD OF A RESULTING CONTRACT

A resulting Contract is expected to commence on October 2019 and conclude by September 2020.

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 (pass or fail) with all IDRC's **Mandatory Requirements**. Non-compliant Proposals will receive no further consideration.

PART 1: *General Mandatory Requirements of this RFP*

These general Mandatory Requirements will be confirmed by IDRC:

#	Mandatory Requirements	Pass or Fail
Mi.	Met submission close date and time	
Mii.	Included all required files	

PART 2: *Statement of Work Mandatory Requirements*

The Proponent **must provide detailed information relative to each mandatory requirement**. 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 "xxxx", paragraph 3 and 4.

Mandatory Requirements in Response to the Statement of Work:

#	Mandatory Requirements	Compliant (yes or no)	Response
	COMPANY		
M1.	<p>Company - Executive Summary</p> <p>The Proponent shall include a short executive summary (maximum 1 page) highlighting the following:</p> <p>a. a description of the company outlining:</p> <ul style="list-style-type: none"> the Proponent's business and specializations 		

	<ul style="list-style-type: none"> • the location of its head office and other offices (specify city and province only) • details of any sub-contracting arrangements to be proposed <p>b. a brief summary of what makes the Proponent's organization stand out from its competitors</p>		
	RESOURCES		
M2.	<p>All Proposed Resources - <i>Outline</i> The Proponent shall outline <i>all proposed resources, including roles and responsibilities</i>, to be used in providing the services and include:</p> <p>a. their roles , structure and reporting relationships b. name, title, telephone #, email address, location (city and province only*)</p>		
M3.	<p>All Proposed Resources - <i>CV</i> The Proponent shall include an up-to-date CV of <i>each proposed resource. (maximum 6 pages for each resource)</i></p>		
M4.	<p><i>Demonstrate Similar Searches</i> In order to demonstrate that the Proponent has completed similar services, the Proponent's response must minimum of (1) one to a maximum of (3) three examples of similar work maximum length for each example is (2) two pages For each example, the following should be provided:</p> <p>a. name and address (city and province only) of the client; b. Service period, start and end dates; c. Brief description of services provided by the proponent; and d. Name and contact information of client's main contact for the undertaken contract</p>		

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**.

Summary Table:

Rated Requirements	Weighting % A	*Points 0-10 B	Score A x B
Resources section	25		
Methodology section	40		
Total %	65		

*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 most stated requirements
7	Meets all stated requirements
8	Meets all stated requirements and may exceed some
10	Exceeds the stated requirements in superlative and beneficial ways

INSTRUCTIONS:

The following requirements will be evaluated according to the degree to which they meet or exceed IDRC's requirements.

As stated in **Section 4.6 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
	Resources	25	
R1.	Demonstrate Similar Services		

	In order to demonstrate that the Proponent has completed similar services as described in the Statement of Work, the proponent must have the following skills.		
a	Sound understanding of the constraints of conducting research in low and middle income countries, particularly across sub-Saharan Africa	3	
b.	Proven strong report writing and presentation skills, ability to communicate complex technical ideas using non-technical language to diverse audiences	3	
c.	Experience evaluating research which integrates meaningful gender and equity analysis in the design, implementation and communication	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 emerging research topics within the broader field of maternal and child health	5	
e.	Expertise in use of mixed-methods approaches for evaluation of implementation research projects	5	
f.	Knowledge of program-level evaluation of research and innovations and policy uptake for development	4	
	METHODOLOGY	40	
R2.	Understanding of IDRC and SOW The Proponent should demonstrate that it has a complete understanding of: a. IDRC; and b. the objectives and requirements in Statement of Work	10	
R3.	Approach The Proponent should describe its approach to successfully deliver the requirements detailed in the Statement of Work and include a draft project schedule detailing milestone.		
a.	Methodology Including: <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 (provide an overview of the limitations of proposed designed and articulate mitigation strategies; • References made to relevant literature and evaluation design approaches; • A detailed timeline (including proposed travel period); 	25	
b	Risk Management Plan Describe any contingencies that may hinder the progress or outcome of the evaluation and suggest how you mitigate them.	5	

3.2.3 Step 3 – Shortlist and Interviews (Weighting 25 points)

Shortlisted Proponents may be asked to prepare a presentation, to provide additional information prior to the final selection. IDRC reserves the right to supply more information to those Proponents who are shortlisted. The interview will provide the evaluation team more insight on if the proponent has the appropriate understanding and knowledge to deliver on the evaluation. Does the proponent demonstrate the expertise and experience to implement their proposed evaluation approach and risk management plan?

3.2.4 Step 4 - Financials

The **shortlisted** Proponents' Financial Proposals will be scored. The Proponent submitting the lowest price will receive the maximum 10 points on the standard evaluation scale of 0-10. All other Proponents will receive a prorated score out of 10 based on the relative proportion of their price to the lowest price submitted.

RFP Section	Rated Requirements	Weighting A	Points 0-10 B	Score A x B
4.6	Total pricing, exclusive of taxes	10		
	Total %	10		

3.2.5. Step 4 - Final Score

Scores for the shortlisted Proponents' proposals will be calculated, and IDRC may select the Lead Proposal achieving the highest total points ("Lead Proponent"), 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. This is a pass/fail test. Pass means that Contract discussions begin. Fail means that the Lead Proponent may not enter into Contract discussions and is disqualified from further consideration. The Lead Proponent must provide this information upon 72 hours of IDRC's request; failure to comply may result in disqualification.

Note: In the case of a joint venture or consortium, each and all members of the joint venture or consortium must provide the information required for their legal form.

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

4.2 OFFICIAL LANGUAGES

Proposals may be submitted in English or French.

4.3 ORGANIZATION OF RESPONSES

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

see RFP Section for full details	File	Contents
4.4	1.0	Cover Letter
3.2	2.0	Mandatory Requirements Checklist and Rated Requirements Checklist
4.6	2.0	Technical Proposal
4.7	3.0	Financial Proposal
5.9, Annex A	4.0	Objections with reasons regarding the proposed contract terms and conditions included in this RFP

4.4 COVER LETTER

The Proponent should provide *as a separate file*.

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

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

4.5 MANDATORY AND RATED REQUIREMENTS CHECKLIST

The Proponent should provide *as a separate file*.

The Proponent **should** create and include a Checklist, using the following format*, of all **Mandatory Requirements** and all **Rated Requirements** listed in **3.2 Evaluation Methodology**, that Indicates where in the Proponent's Proposal the response to each requirement can be found:

***Example:**

Item #	Requirement	Rating	Response Location
B2.4.1	Lead Resource must be bilingual.	Mandatory	See page 3, heading “xxx”, paragraphs 3 and 4.
C3.2.2	Demonstrate the qualifications of the Lead Resource.	Rated	See page 18, Appendix B, section B1.1

***Hint:** copy the tables 3.2

4.6 TECHNICAL PROPOSAL

The Proponent should provide *as a separate file*.

4.6.1 Table of Contents

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

4.6.2 Response to the Statement of Work

The Proponent **must** provide detailed information relative to:

- a. Each requirement listed in the Statement of Work;
- b. Each **Mandatory Requirement** in 3.2; and
- c. Each **Rated Requirement** in 3.2.

The Proponent must clearly outline the work that the Proponent proposes to undertake for the provision of these Services to IDRC.

4.7 FINANCIAL PROPOSAL

The Proponent should provide a *as a separate file*.

4.7.1 Financial Requirements

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

Financial Requirements
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.
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. e.g. All prices must include a detailed breakdown and include at a minimum the following: <ol 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.

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.

4.7.2 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 RFP 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 **RFP Authority** by Thursday, September 19, 2019, at 11:00 a.m. EDT in order to receive a response prior to the close date. When submitting, Proponents *email subject line* should cite “**RFP # 19200012 - Innovating for Maternal and Child Health in Africa (IMCHA) Summative Evaluation**”.

The RFP Authority will provide **all answers to significant enquiries** 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

The preferred method of proposal submission is electronic, via **email**, in **Microsoft Word** or in **PDF** format to the RFP Authority named on page 1. Proponents *email subject line* should cite “**RFP # 19200012 - Innovating for Maternal and Child Health in Africa (IMCHA) Summative Evaluation**” when submitting via email.

Important Note: Email messages with large attachments can be slowed down in servers between the Proponent’s email and the RFP 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 RFP 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 Files

The Proponent's electronic submission should consist of **five (5) files** (i.e. 5 separate documents) as noted in section **4.3**.

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 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 (reference section **4.3**). Failure to identify objections at the proposal stage may preclude Proponents from raising these objections in the course of any future negotiations.

ANNEX A – Proposed Contract

Specific Terms and Conditions of the Contract

CONTRACT NO. _____

This Contract is between _____ (“**Consultant**”) and Canada’s **International Development Research Centre**, 150 Kent Street, PO Box 8500, Ottawa, ON, K1G 3H9 (“**IDRC**” or “the **Centre**”).

The parties agree as follows:

1. TERMS OF REFERENCE AND SCHEDULE

1.1 Summary

1.2 Scope

1.3 Schedule

1.4 Contract Resources

The following individuals are the main contacts for this Contract:

1.4.1 IDRC will be represented by:

1.4.2 The Consultant will be represented by:

It is understood that the Consultant will assign performance of all work under this Contract to _____. Written authorization from IDRC’s **Project Authority** must be obtained in advance for any substitution of personnel. The Consultant must ensure that its employees, subcontractors and assignees alike are subject to the terms and conditions of this Contract, which shall take precedence over any other terms and conditions that may exist between the Consultant and those persons.

1.5 Service Location

1.6 Service Engagement Process

1.7 Change Management

Any changes to the Services will require written agreement from both parties. IDRC's **Contracting Authority** may issue Amendments to the Standing Offer to reflect such changes.

2. FEES

In consideration of these Services, IDRC will pay the Consultant _____.

3. TRAVEL AND TRAVEL EXPENSES

4. INVOICES

4.1 Invoice Schedule

The Consultant shall invoice IDRC according to the following schedule:

4.2 Invoice Submission Instructions

Invoices and any required backup documentation must be sent electronically to:
invoices-factures@idrc.ca

Invoices must be set out as follows:

- IDRC's **Contract number**
- Invoice number
- Invoice Date
- Fees - detailed description, daily rate and number of days or unit rate and number of units or fixed price
- Travel expenses, if applicable – detailed description, quantity, and price (and include any required back up documents with invoice)
- Taxes - Canadian 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 are charging back to IDRC
- Canadian GST/HST registration number, if applicable
- Currency

5. PAYMENTS

5.1 Payment Inquiries

Payment inquiries should be sent electronically to:
ap-cc@idrc.ca

5.2 Payment Method

All payments related to this Contract will be made based on information provided by the Consultant in the **Supplier, Tax and Bank Information form**, which will form part of the Contract and should be supplied from time to time to IDRC for updates to the information.

5.3 Advance Payments

IDRC will make no advance on fees and travel expenses.

5.4 Conditions Precedent for Payment

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

- a) Completion and delivery of the information requested in the **Supplier, Tax and Bank Information form**.
- b) Satisfactory performance of Services and satisfactory completion of Deliverables.
- c) Proper completion of invoice(s) as set out in the **Invoice section** above.

IDRC will issue payment of fees, and travel expenses if applicable, according to IDRC's standard payment period of **thirty (30) calendar days**. The **payment period is measured** from the date IDRC receives the duly completed Supplier, Tax and Bank Information form, or the date IDRC receives an acceptable invoice, or the date the Services and Deliverables are performed and delivered in acceptable condition as required in the Contract, whichever is latest. If the content of the invoice or the requisite form is incomplete, if the Services have not been performed in accordance with this Contract, or the Deliverables are not accepted by IDRC, the Consultant will be notified, and the payment period will be deferred until all deficiencies have been rectified to IDRC's satisfaction.

IDRC will reimburse the Consultant for applicable commodity taxes, net of input tax credits that have claimed directly from Canada Revenue Agency or the Consultant's country commodity tax offices.

IDRC will not pay more than one (1) day of fees per 24-hour period. IDRC will not pay any fee nor any travel 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 IDRC. 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 IDRC harmless against said Tax Claims.

6. SPECIAL CONTRACT CONDITIONS

7. CONTRACT DOCUMENTS

The Specific Terms and Conditions of the Contract, Attachment **A**- General Terms and Conditions of the Contract, Attachment **B**- Travel and Travel Expenses, and Attachment **C**- _____ constitute the entire Contract between the parties.

The Contract documents are complementary and what is called for in any one shall be binding as if called for by all. The Contract documents shall be interpreted as a whole and the intent of the whole rather than the interpretation of any particular part shall govern. In the event of a conflict between them, the Contract documents shall have precedence among themselves in the order as listed above.

8. CONTRACT ACCEPTANCE AND SIGNATURES

By signing this Contract, each party accepts the contents of the Contract.

This Contract will become effective when all the parties have signed it. The date this Contract is signed by the last party to sign (as indicated by the date associated with the party's signature) will be deemed the date of this Contract.

CONSULTANT

By: _____
Signed

Printed Name

Title

Date

IDRC

By: _____
Signed

Printed Name

Title

Date

Attach:

- Attachment **A** – General Terms and Conditions of the Contract
- Attachment **B** – Travel and Travel Expenses
- Attachment **C** – _____

ATTACHMENT A - General Terms and Conditions of the Contract

A1. DEFINITIONS

For the purposes of this Contract:

"Commencement Date" shall mean the date on which the Services 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 IDRC, and includes, without limitation, IDRC'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, subcontractors and agents, as applicable, and any other representative for whom the Consultant is responsible at law.

"Contract" shall mean the **Specific Terms and Conditions of the Contract**, including any and all **attachments** incorporated therein by reference. In the event of a conflict between the Specific Terms and Conditions versus the attachments, the Specific Terms and Conditions shall prevail.

"Day" means seven and a half hours (7.5) hours, unless otherwise specified in the Contract, and exclusive of meal breaks, with no provision for annual leave, statutory holidays and sick leave.

"Deliverables" means the items to be written, developed or prepared by the Consultant pursuant to this Contract, including, without limitation, all works of authorship, reports, recordings, information, documents, materials, or software, whether in hard copy or electronic form.

"Derivatives" shall mean: 1. any translation, abridgement, revision, or other form in which an existing work may be recast, transformed, or adapted; 2. for patentable or patented material, any improvement thereon; and, 3. 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.

"IDRC" or "the Centre" means the International Development Research Centre.

"Services" mean the services to be provided by the Consultant in accordance with the Contract, including the Deliverables as set out in the Contract.

"Termination Date" shall mean the earlier of (a) the date on which all Services and Deliverables have been performed and delivered; (b) the end date as specified in the Contract; and (c) the date on which the Contract terminates by operation of the Termination provisions contained in this Contract.

A2. TIME OF ESSENCE

Time shall be of the essence of every provision of this Contract.

A3. ENTIRE AGREEMENT

This Contract supersedes all previous Contracts and correspondence, oral or written, between IDRC and the Consultant, pertaining to the subject matter of this Contract, and represents the whole and entire understanding between the parties. No modification, variation or amendment of it shall be binding upon the parties unless it is in writing and signed by both parties.

A4. NON-EXCLUSIVITY

This Contract shall not grant the Consultant exclusivity of supply. IDRC may perform services or develop items similar or identical to the Services or Deliverables, or obtain them from any third party.

A5. WARRANTY

The Consultant covenants that it will provide its Services pursuant to this Contract in a diligent and workmanlike manner, with regard to the best interests of IDRC, and warrants that its personnel possess the skill and experience necessary to the satisfactory performance of the Services.

A6. TAXES

IDRC is subject to applicable commodity and other tax legislation and regulations in Canada and is generally not exempt from paying HST/GST on goods and services it procures, unless otherwise specified in the Contract. Additionally, IDRC is subject to applicable tax legislation and regulations in force in the countries where its regional offices are located.

IDRC will **withhold** and remit to the Canada Revenue Agency (CRA), **15% of fees and non-exempt travel expenses of non-Canadian resident** Consultants performing work in Canada unless the Consultant provides to IDRC a Contract-specific waiver from the CRA. Such funds can be reclaimed by the Consultant from the CRA or from their own governments, as the case may be. Non-Canadian resident Consultants that are travelling to Canada to perform work can contact the CRA to obtain additional information about the current regulations and waivers. The main CRA website can be found at <http://www.cra-arc.gc.ca>.

A7. INVOICES

Invoice requirements are noted in the **Invoices section** of the **Specific Terms and Conditions of the Contract**.

A8. PAYMENTS

Conditions precedent for payment are noted in the **Payments section** of the **Specific Terms and Conditions of the Contract**.

A9. TERMINATION

Termination for Cause: In addition to or in lieu of any other remedies that IDRC has in law or in equity, IDRC may terminate this Contract immediately without notice in the event:

- a) The Consultant breaches any material term of this Contract, and fails to remedy such breach within thirty (30) calendar days of receiving notice to do so by IDRC.
- b) IDRC, in its sole discretion, determines that the Consultant made a misrepresentation during the process of selection.
- c) The Consultant:
 - i. ceases to carry on business,
 - ii. 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
 - iii. 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.

Termination without Cause: IDRC may at any time by notice in writing suspend the work of the Consultant or any part thereof. This Contract may be terminated in its entirety or in part by IDRC upon written notice. On such termination or

suspension, the Consultant shall have no claim for damages, compensation, or loss of profit against IDRC except payment for Services performed and Deliverables submitted up to the date of notice of such suspension or termination, or completed thereafter in accordance with the notice.

A10. INSURANCE

The Consultant is responsible for taking out at its own expense any insurance deemed necessary while executing this Contract.

If the Consultant will be working on-site at IDRC, the Consultant shall maintain during the term of this Contract, Commercial General Liability insurance in the amount of not less than CAD 5,000,000.00 inclusive per occurrence, with IDRC named as "additional insured", unless otherwise specified in the Contract.

Upon the request of IDRC, the Consultant shall provide the **insurer's certificate**.

A11. USE OF IDRC PROPERTY

Access to Information Systems and Electronic Communication Networks: During the course of this Contract, the Consultant may be provided with access to IDRC information systems and electronic communication networks. The Consultant, on behalf of its/his/her employees, subcontractors and representatives, agrees to abide by IDRC policies concerning use of such information systems and networks. IDRC 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.

Access to IDRC Premises: The parties agree that reasonable access to IDRC'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 IDRC. The Consultant agrees to observe all IDRC security requirements and measures in effect at IDRC's premises to which access is granted by this 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 IDRC.

A13. RELATIONSHIP WITH IDRC

Nothing in this Contract 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 IDRC, or to bind IDRC 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 IDRC. The Consultant shall be responsible for all matters related to it or its employees 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 IDRC in respect of any such remittances which may be subsequently required by the relevant authorities, together with any related interest or penalties which IDRC may be required to pay.

A14. CONFIDENTIALITY OF INFORMATION

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

Exclusions from Nondisclosure and Non-use Obligations: The Consultant's obligations under the preceding subsection with respect to any portion of the Confidential Information shall terminate when the Consultant can document that:

- a) it was in the public domain at or subsequent to the time it was communicated to the Consultant by IDRC through no fault of the Consultant;
- b) 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 IDRC; or
- c) it was developed by the Consultant, its employees or agents independently of and without reference to any information communicated to the Consultant by IDRC.

A disclosure of Confidential Information (1) in response to a valid order by a court or other governmental body, (2) otherwise required by law, or (3) 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 IDRC to seek a protective order or otherwise prevent such disclosure.

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

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

This section shall survive the termination of this Contract.

A15. ASSIGNMENT OF COPYRIGHT AND WAIVER OF MORAL RIGHTS

In consideration of the fees paid, the Consultant, its employees, subcontractors, successors and assignees expressly agree to assign to IDRC any copyright arising from the Deliverables. The Consultant hereby agrees to waive in favour of

IDRC any moral rights in the Deliverables. The Consultant shall secure any additional waivers of moral rights in the works in favour of IDRC, from personnel and subcontractors, as appropriate.

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

A16. PATENT, TRADE MARK, TRADE SECRET AND COPYRIGHT INFRINGEMENT

The Consultant covenants that no Services or Deliverables to be provided to IDRC under this Contract 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 Deliverables provided pursuant to this Contract 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 Deliverables by IDRC.

The Consultant agrees to indemnify and hold IDRC harmless from and against any and all damages, costs, and expenses (including court costs and reasonable legal fees) incurred by IDRC 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 IDRC has a liability in this regard.

This section will survive termination of the Contract.

A17. 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 Services and Deliverables being contemplated by this Contract.

The Consultant 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 IDRC 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.

A18. COMPLIANCE WITH LAWS

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). IDRC 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.

A19. GOVERNING LAW

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.

A20. 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.

A21. 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.

A22. FORCE MAJEURE

Neither party shall be in default by reason of its delay or failure to perform its obligations by reason of strikes, lockout or other labour disputes (whether or not involving the party's employees), floods, riots, fires, acts of war or terrorism, explosions, travel advisories or any other cause beyond the party's reasonable control. Each party will use its best efforts to anticipate such delays and failures, and to devise means to eliminate or minimize them.

A23. NOTICES

Any notices, requests, or demands or other communication relating to this Contract shall be in writing and may be given by: 1. hand delivery, 2. commercial courier, 3. facsimile, 4. registered mail, postage prepaid, or, 5. electronic mail.

Any notice so sent shall be deemed received as follows: 1. if hand delivered, on delivery, 2. if by commercial courier, on delivery, 3. if by registered mail, three (3) business days after so mailing, or, 4. if by facsimile or electronic e-mail, on the date sent. The initial address and facsimile number for notice are set out in this Contract and may be changed by notice hereunder.

A24. REVIEW AND AUDIT

The Consultant agrees, if IDRC so requests at any time up to two (2) 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 IDRC reasonable access to all financial records relating to the Services and Deliverables to permit IDRC to audit the use of its funds. This shall include books of account, banking records and, in the case of individuals, credit card statements.

This section will survive termination of the Contract.

A25. 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.

ATTACHMENT B – Travel and Travel Expenses

B1.GENERAL

B1.1 Travel Expenses

IDRC agrees to pay the **travel expenses** detailed in this **Attachment** incurred by the Consultant only when the travel expenses are *directly* related to the purposes for which the Consultant is engaged.

B1.2 Travel Approval

All travel requirements must be pre-approved in writing with IDRC's **Project Authority**.

B1.3 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, *except for 'visitor type' visas*, which are included under the **mobilization allowance** provided to Consultants.

B1.4 Travel Insurance, Personal Safety and Health

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 Contract. 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

IDRC's designated 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 IDRC's designated travel agency shall be at the expense of the Consultant.

Upon the request of IDRC, the Consultant shall provide IDRC with an **insurer's certificate**.

The Consultant has the exclusive responsibility for maintaining **personal safety and good health** during the period of this Contract. IDRC strongly suggests that the Consultant 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 Consultant to seek information and advice from any other reliable sources.

Should travel not be advised by the authorities, the Consultant must immediately upon making that determination advise the IDRC Representatives who will, at IDRC's discretion, either terminate the Contract, or with the Consultant's agreement, defer performance until the restrictions on travel are removed, or propose an alternative work plan for the Consultant's agreement.

IDRC also strongly suggests 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. IDRC especially recommends that:

- A Travel Medicine Clinic be consulted if possible; and
- Health and accident insurance, including coverage for emergency evacuation, be obtained.

Traveller's health information is available in the public domain, including from 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.

B1.5 Air/Rail Travel Booking Process

IDRC's travel policy requires that all air/rail travel be procured (organized and prepaid) by IDRC, using IDRC's designated travel agency.

The Consultant must travel **economy class** by the most direct and economical routing. The Consultant is free to reroute or upgrade, where possible, at his or her own expense and settle any additional cost directly with the airline/rail line after the ticket has been purchased.

To obtain tickets, the process is as follows:

Step 1:

The Consultant will contact IDRC's **designated travel agency** (reference the chart below), providing them with the **IDRC Contract number** and **identifying the IDRC Travel Representative**, to put together a suggested itinerary and routing.

Step 2:

The **designated travel agency** will contact the **Travel Representative** to review and approve the itinerary and routing.

Step 3:

Once approved, the Consultant will receive the itinerary and ticket(s) electronically.

Step 4:

The **designated travel agency** will then bill IDRC directly.

NOTE:

*IDRC's designated travel agency is **HRG**. Your contact there is e-mail: idrc.ca@hrgworldwide.com.*

*If you are calling from the **Ottawa metropolitan area**, telephone 1-877-780-1456.*

*If you are calling from outside Ottawa, **from Canada or the United States of America**, dial the toll-free number 1-877-780-1456.*

***From outside Canada or the United States of America**, call collect +1-613-230-2384.*

Please be ready to quote the Contract number and identify IDRC's Travel Representative every time you contact the travel agency.

In compliance with American travel and immigration regulations, airlines demand that travelers destined to or transiting through the United States of America provide the travel agency with their passport number, nationality, date of birth, and gender. The name on the airline booking file must exactly match the name on the passport. This information may also be required by other countries. Have it ready in all cases.

B1.6 Hotel Booking Process

IDRC's designated travel agency can arrange and book hotels for the Consultant, noting that the Consultant pays the hotels directly (reference **section B2.2**).

B1.7 Travel Time

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

B2. TRANSPORTATION AND LIVING ALLOWANCE EXPENSES

IDRC agrees to cover the following transportation and living expenses provided in the tables below, to a maximum of _____ (where this amount does not include travel prepaid by IDRC, which is thus over and above this amount).

B2.1. Travel Expenses-Transportation

-Rates are per person.

-Amounts and rates noted in this section do not include the Canadian HST 13% tax, which is extra.

-IDRC will communicate in writing the additional details, such as the **number of trips**, to the Consultant after the travel destinations and exact durations become known.

Transportation Travel Expense Description	Arranged by	Rate	Receipts required with invoice
Air travel	IDRC's Designated Travel Agency	Prepaid by IDRC as described in section B1.5	n/a
Mobilization Allowance This amount covers any incidental airport/train station expenses (such as departure taxes) not included with the air/train ticket, 'visitor type' visas, and ground transportation to and from transportation drop off point (i.e. airport/train station) **to be included on invoices**	Consultant	—	No
Local Transportation Reimbursement must be substantiated by appropriate original receipts and proof of purchase. Reimbursement will be <i>up to a maximum amount of</i> - see Rate column. **to be included on invoices**	Consultant	—	Yes

B2.2. Travel Expenses-Living Allowance

-Rates are per person.

-Amounts and rates noted in this section do not include the Canadian HST 13% tax, which is extra.

-IDRC will communicate in writing the **number of days payable** to the Consultant after the travel destinations and exact durations become known

Living Allowance Travel Expense Description	Arranged by	Rate	Receipts required with invoice
Daily Living Allowance While in ___ city and ___ country, this living allowance covers the cost of accommodations, meals, laundry, local telephone calls, and gratuities. **to be included on invoices**	Consultant (note section B1.6 re: hotels)	—	No