



REQUEST FOR PROPOSAL (“RFP”)

RFP #: 20210018	RFP Title: CDKN 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 **five (5) regional offices** located in New Delhi-India, Montevideo-Uruguay, Amman-Jordan, Nairobi-Kenya, and Dakar-Senegal. 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 the provision of Consultant to undertake an Evaluation of the CDKN where requirements are described in section 2, the Statement of Work (“Services”).

1.3 DOCUMENTS FOR THIS RFP

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

- This RFP document
- Annex A – Resulting Contract Terms and Conditions
- Annex B – Mandatory Requirements Checklist
- Annex C – 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	See page 1
Deadline for Enquiries	See section 5.1
RFP close date	See page 1
Commencement of Services	February 2021

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 Climate and Development Knowledge Network ([CDKN](#)) is a Southern-led knowledge brokering network that aims to inform and support decision-makers in designing and delivering climate compatible development. CDKN works in partnership with decision-makers in the public, private and non-governmental sectors nationally, regionally and globally. CDKN supports uptake of demand-led, policy-relevant, applied research, led and implemented by a wide range of universities, private sector partners, NGOs and international agencies. It supports projects that not only demonstrate scientific excellence, but also clearly respond to identified developing country needs and demand and promise high policy impact. CDKN values innovative, game-changing research within the context of climate compatible development.

CDKN’s desired overall long-term impact is for actors in policy, planning, programming and delivery of climate action at sub-national, national and international levels to interdependently implement gender-responsive and socially equitable climate actions. To achieve this, CDKN pursues three objectives:

- Maximize the collective impact and knowledge uptake of key climate and development programs and increase the accessibility and relevance of the new knowledge and learning;
- Facilitate the uptake and use of this knowledge and learning to enable key implementing and influencing actors at global, regional and country levels to make robust, climate-resilient decisions at scale;
- Enhance leadership and collaboration on implementation through facilitating peer learning and engagement, and assisting actors to become more networked, influential and persuasive champions of climate action.

CDKN initiated in 2010 with financial support from the UK Foreign, Commonwealth & Development Office (former UK Department for International Development) and the Directorate-General for International Cooperation of the Netherlands (DGIS). Its current [second phase](#) (2018-2021) is supported financially by IDRC and DGIS (CAD\$12.5 million). Since 2018, CDKN is led by South Africa-based SouthSouthNorth (SSN), working closely with its partners Fundación Futuro Latinoamericano (FFLA) in Quito, ICLEI – Local Governments for Sustainability, South Asia in Delhi, as well as the Overseas Development Institute (ODI) in London.

This second phase of CDKN has been marked by a shift from being a knowledge translator toward being a fully Southern-led network and knowledge broker, which is a unique role. To date, CDKN has recognized that the value is in the process (facilitating and convening) not the product (editing and producing knowledge products). Also, the program is demand-led for climate action. It also utilizes south-south networks to foster peer learning. CDKN’s approach and brand identity are consistent at the country, regional and global levels. Finally, the program considers gender responsiveness and social inclusion to be paramount in all climate action.

This new identity is generating a systematic knowledge sharing and learning about what it means to be a knowledge broker for climate compatible development. CDKN’s knowledge services focus on making information and learning on climate compatible development easier to access and use, in support of ambitious climate action. CDKN works in three areas or work packages that support progress toward its objectives:

- **Knowledge:** They synthesise and tailor the wealth of evidence and learning on climate compatible development from CDKN and other international climate programmes to produce highly targeted knowledge and tools to support policy design and implementation.
- **Engagement:** They engage in countries in Africa, Asia and Latin America to ensure this tailored knowledge is used and achieves impact. They share the latest climate information and learning to enhance global knowledge and inform key debates.
- **Peer learning:** They bring developing countries together to share their experiences and learning on delivering climate action on the ground. They help connect fellow professionals who face similar climate and development challenges, within and across borders.

SSN leads the global program and the Africa program, while FFLA and ICLEI South Asia lead the regional programs in Latin America and Asia respectively. Also, in nine CDKN priority countries (Colombia, Ecuador, Peru, Ghana, Kenya, Ethiopia, India, Nepal, and Bangladesh), trusted in-country knowledge brokers (called Country Engagement Leaders - CELs) help respond to the disconnect between researchers and key actors in the countries within which they operate, with targeted and sustained in-country engagement with key national actors. CDKN has also supported several in-country “knowledge basis projects”, all of which build off previous research to achieve research uptake and impact. Support has been in the form of capacity building for knowledge brokering and financial support.

2.2 DESCRIPTION AND SCOPE OF WORK

2.2.1 Project Scope

In Scope:

Through this consultancy, IDRC is embarking on an evaluation of CDKN that has two parts. The first part will focus on CDKN’s structure and functioning during this current phase (2018-2021), compared to its previous phase (2010-2018). It will provide independent judgement on future pathways toward the long-term sustainability for this global network, and as such is largely formative in orientation.

The second part of the evaluation will consider progress against objectives during 2018-2021 and will include a focus on the relevance of knowledge produced and brokered, effectiveness of engagement & outreach approaches, and successes in building leadership & collaboration on implementation through peer learning. It will also focus on the cross-cutting themes (climate finance, gender, and water-energy-food nexus), the global and the three regional programs, and consideration of the partnership model. As such, this part of the evaluation will be oriented toward accountability, but it will also integrate significant formative elements to it.

The consultant or firm will mainly collaborate with the IDRC responsible program officer for CDKN.

Evaluation Users, Uses and Questions:

The funders—IDRC and DGIS—will be primary users of both parts of the evaluation; CDKN leadership will also be primary user of the first part.

While CDKN is entering its final year of implementation, the timing of this evaluation is to accommodate an opportunity to inform thinking and decisions in 2021 regarding the long-term sustainability of CDKN and future programming. This consultancy will also contribute to foster learning about Southern-based knowledge brokering for climate compatible development.

In order for relevant results to be available in a timely manner to maximize use, the evaluation will be conducted in two parts, with results reported in two segments (an interim report and a final report).

The key evaluation questions are as follows and are listed in the order that they should be answered:

1. Considering the changes in structure and functioning of CDKN during its most recent phase (2018-2021), how have these changes in the delivery model been implemented to respond to strengths and weaknesses identified in earlier phases? What are opportunities and challenges in the CDKN structure and functioning going forward, and what unmet needs remain?
2. To what extent has CDKN succeeded, or not, in achieving its objectives and outcomes? Is the CDKN Phase II approach (2018-2021) contributing to achieving the programme's objectives and outcomes?
3. To what extent has CDKN's focus on each of its four key themes (climate finance, gender, cities, water-energy-food nexus), and the three regions plus a global focus, produced relevant and actionable knowledge or achieved knowledge uptake? What gaps remain that could inform future work and areas of focus?
4. To what extent and how has the funding partnership, including the role of IDRC, enabled or constrained the achievement of outcomes under CDKN Phase II? What might be done differently next time?

The inception phase of the evaluation will include further unpacking of these questions.

Having answered the evaluation questions, the evaluation team should draw out relevant lessons learned, conclusions and recommendations.

2.2.2 Evaluation Team

The Program will contract one independent consultant or firm to undertake the evaluation process. IDRC will not consider applications that do not clearly identify the team leader, in the case of firms. Only one contract will be issued with the selected proponents.

Proponent

The **proponent** will have the overall responsibility for:

- Ensuring that all products take into consideration the *OECD/DAC (2010) Quality Standards for Development Evaluation* and *IDRC's evaluation principles*;
- Leading, in coordination with IDRC, the design scope, and methodology for the evaluation;
- Collecting and analyzing data;
- Participating in meetings or workshops considered relevant by the IDRC program officer for CDKN;
- Reporting regularly on progress to IDRC;
- Ensuring the deliverables, milestones and schedules are met.

The **IDRC program officer for CDKN** will be responsible for:

- Providing information and access to documents and the virtual CDKN drive and monitoring system, in coordination with the CDKN program team, as required;
- Making logistical arrangements for particular events or workshops, in coordination with the CDKN program team, if needed;
- Coordinating required inputs on draft workplans and reports;
- Reviewing and approving the final report.

2.2.3 Evaluation Ethics and Standards

Evaluator(s) will ensure that appropriate ethical standards and guidelines have been developed and observed in the implementation of the staged evaluation. The Consultant will ensure he/she or they take into consideration the “[OECD/DAC \(2010\) Quality Standards for Development Evaluation](#)” and [IDRC’s evaluation principles](#). Quality will be assessed on the extent to which the evaluation demonstrated that it has fulfilled its purpose using these standards. IDRC’s Policy and Evaluation Division will provide ongoing appraisal of the maintenance of ethical standards throughout the evaluation process.

2.2.4 Consultant Profile

The evaluation will require an independent consultant or a team of consultants who combine experience and expertise with evaluation, evaluation for sustainability (ideally of organizations, programs or networks), knowledge translation or knowledge brokering, research for impact programming, climate change adaptation issues, and working with Southern-based programs. The individual or team must have the capacity to ensure that gender equality and social inclusion is taken into account in all aspects of the evaluation (i.e. design, data collection, analysis and reporting). One evaluator will act as the team leader. The team leader will provide overall guidance for the evaluation process, and be responsible for the quality and timeliness of all outputs. The evaluation consultant or evaluation team will consist of members who between them should have the following skills, experience and competencies:

- Experience in the design and conduct of program-level evaluation of multi-partner initiatives.
- Experience in conducting evaluation to inform the long-term sustainability of organizations, programs or networks;
- Experience in using evaluation to support learning within and across organizations;
- Knowledge and experience conducting evaluation that covers knowledge uptake / knowledge to policy programs, network-based programming, gender and social inclusion dimensions in research and research uptake;
- Knowledge of climate change adaptation issues in low- and middle-income countries would be an asset.
- Experience in working with Southern-based programs.
- Ability and experience in working with multi-organizational initiatives (both donors and implementers).
- Strong communication skills including diplomacy and inter-cultural communication.
- Strong report writing and presentation skills, ability and experience in communicating complex technical ideas using non-technical language to diverse audiences.
- Ability to work in an iterative, collaborative team approach; ability to give and receive constructive feedback.
- Ability to read and speak Spanish.

2.2.5 Project Budget

The budget for this work including all fees and expenses may not exceed CAD \$80,000 inclusive of taxes.

The consultant’s budget should clearly identify the daily rate, level of effort expected (number of days), and expenses related to data collection and analysis. In preparing this budget, the consultants should contemplate the time required for document review as well as additional data gathering required (e.g. surveys or interviews), time required to prepare a report with early findings from the first part of the evaluation, and the draft and final

evaluation report, up to five days of time for engaging IDRC and other key stakeholders in order to present the report, discuss findings, and reflect on their implications, and any additional expenses related to the above activities

2.2.6 Deliverables and Timelines

The key deliverables will be an inception report that sets out the evaluation design, methodological approach, and detailed work plan, with particular emphasis on the first question and an overview of plans for the second part of the evaluation; an interim evaluation report on question one of the evaluation; an updated evaluation design for the second part of the evaluation, and a final evaluation report covering all questions. None of these reports are expected to exceed 30 pages (excluding annexes) and should be submitted in English. The inception report as well as a draft version of the interim and final evaluation report will be reviewed by the commissioners and by IDRC's Policy and Evaluation Division. The consultant will revise and submit a final report based on feedback from these sources.

Months	Milestones and deliverables (with indicative dates)
March 2021	<ul style="list-style-type: none"> • Early March 2021 - Participation to inception workshop with consultant or firm. • 15 March 2021 – Submission of a draft evaluation inception report, with a detailed focus on the first question and an overview of plans for the second part of the evaluation. This will include the work plan, specific evaluation questions for the first part of the evaluation, method, evaluation framework, Gantt chart and initial list of informants to be consulted.
April 2021	<ul style="list-style-type: none"> • 1 April 2021 - A detailed inception report, modified based on feedback from IDRC.
May 2021	<ul style="list-style-type: none"> • 1 May 2021 – Submission of an interim report on question one of the evaluation, including a two-page executive summary, an introduction, purpose section, and a methodology section, evaluation findings, lessons learned, conclusion and recommendations, as well as potential evaluation questions for follow-up during the next part of the evaluation. • 22 May 2021 – Presentation of preliminary findings to evaluation users. • 31 May 2021 – Submission of revised interim report.
July 2021	<ul style="list-style-type: none"> • 1 July 2021 – Submission of a draft updated evaluation design for the second part of the evaluation with revised workplan, specific evaluation questions, method, evaluation framework, Gantt chart and initial list of informants to be consulted. • 15 July 2021 – Submission of a detailed updated evaluation design report for the second part of the evaluation, modified based on feedback from IDRC.
October 2021	<ul style="list-style-type: none"> • 1 October 2021 - Submission of a draft final evaluation report, including a two-page executive summary, an introduction, purpose section, and a methodology section, preliminary evaluation findings, lessons learned, conclusion and recommendations. • 22 October 2021 - Presentation of findings to IDRC and evaluation users. • 31 October 2021 - Submission of final evaluation report.

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 **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

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

Travel is not expected to be required by the Proponent.

2.5 PERIOD OF A RESULTING CONTRACT

A resulting Contract is expected to be for a period of approximately 7 to 9 months, with the first part of the evaluation to be completed by 31 May 2021, and the second part to be completed by 15 November 2021.

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** as set out in **Annex B**. Non-compliant Proposals will receive no further consideration.

Summary Table:

RFP Section	Mandatory Requirements	Pass or Fail
Annex B	Mandatory Requirements in response to the Statement of Work	

3.2.2 Step 2 - Rated Requirements

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

Summary Table:

RFP Section	Rated Requirements	Weighting % A	*Points 0-10 B	Score A x B
Annex C	Company section	85		
	Total %	85		

*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

3.2.3 Step 3 –Interviews

Proponents may be asked to prepare a presentation and or to provide additional information prior to the final selection.

3.2.4 Step 4 - Financials

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	15		
	Total %	15		

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
4.5, Annex B, Annex C	2.0	Mandatory Requirements Checklist and Rated Requirements Checklist
4.6	3.0	Technical Proposal
4.7	4.0	Financial Proposal
5.9, Annex A	5.0	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 **Annex B** and in **Annex C**, 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
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*Hint: copy the tables in **Annex B** and **C**

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 in **Annex A**;
- b. Each **Mandatory Requirement** in **Annex A**; and
- c. Each **Rated Requirement** in **Annex A**.

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.
<p>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.</p> <p>If the Proponent will not be charging IDRC taxes, an explanation should be provided. See the Notes below for more details on taxes.</p>
<p>c. All prices must include a detailed breakdown following the response to section 2 (Statement of Work). Prices shall include all components normally included in providing the proposed services.</p> <p>e.g.</p> <p>All prices must include a detailed breakdown and include at a minimum the following:</p> <ul style="list-style-type: none"> i. all inclusive daily rate applicable to proposed personnel who will do the work; ii. estimated total number of billable days to do the work;
<p>d. The Proponent shall propose an invoicing schedule if other than providing one (1) invoice upon completion of all Services.</p> <p><i>Important Note:</i> IDRC's payment terms are NET 30 and IDRC will make no advance on fees.</p>

4.7.3 Mathematical Errors

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

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

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

SECTION 5 – CONDITIONS

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

5.1 ENQUIRIES

All matters pertaining to this RFP are to be referred exclusively to the 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 Friday, January 15, 2021, 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 # 20210018-CDKN 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 "**RFP20210018 - CDKN 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**- _____ 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

IDRC

By: _____
Signed

By: _____
Signed

Printed Name

Printed Name

Title

Title

Date

Date

Attach:

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

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.

ANNEX B – Mandatory Requirements Checklist

INSTRUCTIONS:

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

PART 1: *General Mandatory Requirements of this RFP*

These general Mandatory Requirements will be confirmed by IDRC:

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

PART 2: *Statement of Work Mandatory Requirements*

As stated in **Section 4.6 Response to the Statement of Work**, 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 "xxxxx", paragraph 3 and 4.

Mandatory Requirements in Response to the Statement of Work:

#	Mandatory Requirements	Compliant (yes or no)	Response
	COMPANY		
M1.	<p>The Proponent shall include a short executive summary 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 • the location of its head office and other offices (specify city and province only) • the total number of years the Proponent has been in business 		

	<ul style="list-style-type: none"> • the number of full-time employees • details of any sub-contracting arrangements to be proposed <p>b. a brief summary of why the proponent would be interested in and suitable for undertaking the work described in this RFP</p> <p>c. a statement indicating that the proposed team will be able to start and complete the Services within the required time frame.</p>		
M2.	Statement of Independence from the CDKN program under review		
M3.	Statement that there are no activities, relationships or contracts which render the Proponent unable or potentially unable to diligently perform the duties and obligations required of the Proponent if awarded the Contract.		
M4.	The proponent must declare any and all current, present or past dealings the Proponent, its personnel or subcontractors, including a list of IDRC contacts with which the Proponent had dealings so that the IDRC may be in a position to determine whether any unfair advantages exists in connection with the RFP process.		
M5.	The proponent must declare that he/she, its personnel or subcontractors have not received information that could be perceived as an unfair advantage. An unfair advantage will exist if Proponent has, or has access to, information concerning IDRC's estimated budget for the work, this RFP process or related evaluation process, where such information was acquired in any manner other than the following: <ol style="list-style-type: none"> 1. the information is public knowledge, or the information is disclosed to Proponents in the normal course of the Request for Proposal process		
M6	The proponent must provide a statement that it will taking into consideration the: <ol style="list-style-type: none"> a) "OECD/DAC (2010) Quality Standards for Development Evaluation", link: http://www.oecd.org/development/evaluation/qualitystandards.pdf and; b) IDRC's evaluation principles, link: https://www.idrc.ca/sites/default/files/sp/Documents%20EN/evaluation-at-idrc.pdf 		
M7	The Proponent must provide the number of years of relevant professional experience in the conduct of Evaluation Services, as supported by Curriculum Vitae (to be included with the proposal)		
M8.	All Proposed Resources The Proponent must outline the proposed lead resource and all other proposed resources to be used in providing the services (including any subcontracting relationships that are required) and include: <ol style="list-style-type: none"> a. name, title, telephone #, email address, location (city and province/state only); and b. their roles, structure and reporting relationships. 		
M9.	Language of Work		

	<p>Proponents must have at least one individual with proficiency in both English and Spanish or a capacity to ensure interviews and other data collection and analysis can be undertaken in Spanish with Hispanic grantees, therefore proposals must clearly indicate the linguistic capacity of each team member.</p>		
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ANNEX C – Rated Requirements Checklist

INSTRUCTIONS:

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

As stated in **Section 4.6 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
	COMPANY	15	
R1.	<p>Similar Services- <i>Demonstrate</i></p> <p>In order to demonstrate that the Proponent has completed similar services, the Proponent's response must include three (3) examples of programmatic evaluations involving at least one proposed team member that have been successfully completed within the last five (5) years.</p> <p>Each example should include with the following details:</p> <ol style="list-style-type: none"> Project title Name and address (city and province only) of the client; Services period, e.g. start and end dates; Total value of the project and total level of effort Identification of members of the proposed project team who participated and their role. Brief description of services provided by the Proponent, including objectives, deliverables, unique approaches used and value added to the client; and Client reference, including contact name and coordinates. 	5	
R2.	<p>All Proposed Resources Experience – CV's</p> <p>The Proponent's response should demonstrate the quality and level of expertise of its proposed team by providing the following: a one- to maximum two-page up-to-date CV of each proposed resource that includes relevant work experience, education, and all relative professional designations and certifications.</p>	15	
R3.	Proposed Evaluation Team should be composed of members who between them have the following skills, experience and competencies:	25	

	<ul style="list-style-type: none"> • Experience in the design and conduct of program-level evaluation of multi-partner initiatives. • Experience in conducting evaluation to inform the long-term sustainability of organizations, programs or networks; • Experience in using evaluation to support learning within and across organizations; • Knowledge and experience conducting evaluation that covers knowledge uptake / knowledge to policy programs, network-based programming, gender and social inclusion dimensions in research and research uptake; • Knowledge of climate change adaptation issues in low- and middle-income countries would be an asset. • Experience in working with Southern-based programs. • Ability and experience in working with multi-organizational initiatives (both donors and implementers). • Strong communication skills including diplomacy and inter-cultural communication. • Strong report writing and presentation skills, ability and experience in communicating complex technical ideas using non-technical language to diverse audiences. • Ability to work in an iterative, collaborative team approach; ability to give and receive constructive feedback. • Knowledge in Spanish. 		
R4.	The Proponent must demonstrate its Evaluation Approach to successfully deliver the requirements detailed Section 3 - Statement of Work within the required time frame.		
a)	Demonstrate an understanding IDRC, CDKN, and the <i>objectives</i> and requirements in Section 3 - Statement of Work;	20	
b)	<p><i>Methodology</i> - how the Proponent will go about conducting the evaluation – include:</p> <ul style="list-style-type: none"> • achievement of the evaluation objectives; • ethical standards and guidelines; • work plan and expected deliverables; • a detailed timeline and expected deliverables; and • roles and responsibilities chart, including commitments of each team member (if more than one). <p>Time Commitment of consultant or firm - The proponent must include a table of time commitment that the independent consultant or each member of the team would contribute for the next six months and at least deliverables 1 to 3 and ideally one thematic evaluation. Table 1, below, is an example of what would</p>	15	

	<p>be expected in a table of time commitment. As an example only, the table indicates 4 team members, but the actual team may be different than this number.</p> <table border="1" data-bbox="224 310 1023 892"> <thead> <tr> <th data-bbox="224 310 529 352"></th> <th colspan="4" data-bbox="529 310 1023 352">Days</th> </tr> <tr> <th data-bbox="224 352 529 415">Tasks</th> <th data-bbox="529 352 662 415">Team Leader</th> <th data-bbox="662 352 776 415">Member 1</th> <th data-bbox="776 352 906 415">Member 2</th> <th data-bbox="906 352 1023 415">Member 3 (etc.)</th> </tr> </thead> <tbody> <tr> <td data-bbox="224 415 529 478">1. Preliminary document analysis and consultations</td> <td data-bbox="529 415 662 478"></td> <td data-bbox="662 415 776 478"></td> <td data-bbox="776 415 906 478"></td> <td data-bbox="906 415 1023 478"></td> </tr> <tr> <td data-bbox="224 478 529 562">2. Preparation of draft work plan (including the evaluation design matrix)</td> <td data-bbox="529 478 662 562"></td> <td data-bbox="662 478 776 562"></td> <td data-bbox="776 478 906 562"></td> <td data-bbox="906 478 1023 562"></td> </tr> <tr> <td data-bbox="224 562 529 625">3. Revision and finalization of work plan for approval</td> <td data-bbox="529 562 662 625"></td> <td data-bbox="662 562 776 625"></td> <td data-bbox="776 562 906 625"></td> <td data-bbox="906 562 1023 625"></td> </tr> <tr> <td data-bbox="224 625 529 688">4. Data collection, validation and analysis</td> <td data-bbox="529 625 662 688"></td> <td data-bbox="662 625 776 688"></td> <td data-bbox="776 625 906 688"></td> <td data-bbox="906 625 1023 688"></td> </tr> <tr> <td data-bbox="224 688 529 751">5. Presentation of draft findings</td> <td data-bbox="529 688 662 751"></td> <td data-bbox="662 688 776 751"></td> <td data-bbox="776 688 906 751"></td> <td data-bbox="906 688 1023 751"></td> </tr> <tr> <td data-bbox="224 751 529 814">6. Preparation of the draft report</td> <td data-bbox="529 751 662 814"></td> <td data-bbox="662 751 776 814"></td> <td data-bbox="776 751 906 814"></td> <td data-bbox="906 751 1023 814"></td> </tr> <tr> <td data-bbox="224 814 529 877">7. Finalization of the report for approval</td> <td data-bbox="529 814 662 877"></td> <td data-bbox="662 814 776 877"></td> <td data-bbox="776 814 906 877"></td> <td data-bbox="906 814 1023 877"></td> </tr> <tr> <td data-bbox="224 877 529 892">TOTAL</td> <td data-bbox="529 877 662 892"></td> <td data-bbox="662 877 776 892"></td> <td data-bbox="776 877 906 892"></td> <td data-bbox="906 877 1023 892"></td> </tr> </tbody> </table>		Days				Tasks	Team Leader	Member 1	Member 2	Member 3 (etc.)	1. Preliminary document analysis and consultations					2. Preparation of draft work plan (including the evaluation design matrix)					3. Revision and finalization of work plan for approval					4. Data collection, validation and analysis					5. Presentation of draft findings					6. Preparation of the draft report					7. Finalization of the report for approval					TOTAL							
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