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SOUSSIONS À :**

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**Request for Proposal / Demande de
proposition**

proposal to: Department of Foreign Affairs
Trade and Development.

We hereby offer to sell to Her Majesty the
Queen in right of Canada, in accordance with
the terms and conditions set out herein,
referred to herein or attached here to, the
goods, services, and construction listed
herein and on any attached sheets at the
price(s) set out therefor.

Proposition à: Ministère des Affaires
Étrangères, commerce et développement

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Sa Majesté la Reine du chef du Canada,
aux conditions énoncées ou incluses par
référence dans la présente et aux
appendices ci-jointes, les biens, services
et construction énumérés ici sur toute
feuille ci-annexée, au(x) prix indiqué(s).

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Department of Foreign Affairs, Trade and
Development (DFATD) / Ministère des
Affaires étrangères, commerce et
développement (MAECD)

Development Contracting Services / Services
d'approvisionnement du Développement

200 Promenade du Portage,
Gatineau, QC

Title — Sujet: SUMMATIVE EVALUATION OF THE ENHANCING FARMERS' ACCESS TO MARKETS IN EAST AND WEST AFRICA PROJECT	
Solicitation No. — N° de l'invitation	Date:
2022-74241931P-000103-002	August 18, 2021
Solicitation Closes — L'invitation prend fin At 2:00 PM /à: On / le : October 5, 2021	Time Zone —Fuseau horaire DST (Daylight Saving Time) / HAE (Heure avancée de l'Est)
Address Enquiries to — Addresser toutes questions à: Name : Nancy Levasseur E-Mail : nancy.levasseur@internantional.gc.ca	
Destination of Goods and or Services/Destination – des biens et ou services: Department of Foreign Affairs, Trade and Development (DFATD)/ Ministère des Affaires étrangères, commerce et développement (MAECD)	
Vendor/Firm Name and Address — Raison sociale et adresse du fournisseur/de l'entrepreneur:	
Telephone No. – No de téléphone:	
Name and title of person authorized to sign on behalf of Vendor/Firm (type or print) — Nom et titre de la personne autorisée à signer au nom du fournisseur/de l'entrepreneur (taper ou écrire en caractères d'imprimerie).	
_____	_____
Name/Nom	Title/Titre
_____	_____
Signature	Date



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PART 1 - GENERAL INFORMATION

1.1. Security Requirements

There is no security requirement applicable to the solicitation or Resulting Contract.

1.2. Statement of Work

The Work to be performed is detailed under Annex A of the resulting contract clauses.

The requirement is subject to the provisions of the World Trade Organization Agreement on Government Procurement (WTO-AGP), the Canada-Chile Free Trade Agreement (CCFTA), the Canada-Peru Free Trade Agreement (CPFTA), the Canada-Colombia Free Trade Agreement (CColFTA), the Canada-Panama Free Trade Agreement (CPanFTA), the Canada-European Union Comprehensive Economic and Trade Agreement (CETA), the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP), the Canadian Free Trade Agreement (CFTA), the Canada-Ukraine Free Trade Agreement (CUFTA) and the Canada-Korea Free Trade Agreement (CKFTA).

1.3. Debriefings

Bidders may request a debriefing on the results of the bid solicitation process. Bidders should make the request to the Contracting Transaction Authority within 15 working days from receipt of the results of the bid solicitation process. The debriefing may be in writing, by telephone or in person.

PART 2 - BIDDER INSTRUCTIONS

2.1 Standard Instructions, Clauses and Conditions

All instructions, clauses and conditions identified in the bid solicitation by number, date and title are set out in the [Standard Acquisition Clauses and Conditions Manual](https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual) (https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual) issued by Public Works and Government Services Canada.

Bidders who submit a bid agree to be bound by the instructions, clauses and conditions of the bid solicitation and accept the clauses and conditions of the resulting contract.

The **2003** (2020-05-28) Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation.

Subsection 5.4 of **2003**, Standard Instructions - Goods or Services - Competitive Requirements, is amended as follows:

Delete: 60 days

Insert: 180 days

2.2 Submission of Bids

Bids must be submitted only at the following email address: urp-bru@international.gc.ca by the date, time and place indicated on page 1 of the bid solicitation. Due to the nature of the bid solicitation, bids transmitted by facsimile will not be accepted.

2.3 Former Public Servant

Contracts awarded to former public servants (FPS) in receipt of a pension or of a lump sum payment must bear the closest public scrutiny, and reflect fairness in the spending of public funds. In order to comply with Treasury Board policies and directives on contracts awarded to FPSs, bidders must provide the information required below before contract award. If the answer to the questions and, as applicable the information required have not been received by the time the evaluation of bids is completed, Canada will inform the Bidder of a time frame within which to provide the information. Failure to comply with Canada's request and meet the requirement within the prescribed time frame will render the bid non-responsive.

Definitions

For the purposes of this clause, "former public servant" is any former member of a department as defined in the [Financial Administration Act](#), R.S., 1985, c. F-11, a former member of the Canadian Armed Forces or a former member of the Royal Canadian Mounted Police. A former public servant may be:

- a. an individual;
- b. an individual who has incorporated;
- c. a partnership made of former public servants; or
- d. a sole proprietorship or entity where the affected individual has a controlling or major interest in the entity.

"lump sum payment period" means the period measured in weeks of salary, for which payment has been made to facilitate the transition to retirement or to other employment as a result of the implementation of various programs to reduce the size of the Public Service. The lump sum payment period does not include the period of severance pay, which is measured in a like manner.

"pension" means a pension or annual allowance paid under the [Public Service Superannuation Act](#) (PSSA), R.S., 1985, c. P-36, and any increases paid pursuant to the [Supplementary Retirement Benefits Act](#), R.S., 1985, c. S-24 as it affects the PSSA. It does not include pensions payable pursuant to the [Canadian Forces Superannuation Act](#), R.S., 1985, c. C-17, the [Defence Services Pension Continuation Act](#), 1970, c. D-3, the [Royal Canadian Mounted Police Pension Continuation Act](#), 1970, c. R-10, and the [Royal Canadian Mounted Police Superannuation Act](#), R.S., 1985, c. R-11, the [Members of Parliament](#)

[Retiring Allowances Act](#), R.S. 1985, c. M-5, and that portion of pension payable to the [Canada Pension Plan Act](#), R.S., 1985, c. C-8.

Former Public Servant in Receipt of a Pension

As per the above definitions, is the Bidder a FPS in receipt of a pension? **Yes () No ()**

If so, the Bidder must provide the following information, for all FPSs in receipt of a pension, as applicable:

- a. name of former public servant;
- b. date of termination of employment or retirement from the Public Service.

By providing this information, Bidders agree that the successful Bidder's status, with respect to being a former public servant in receipt of a pension, will be reported on departmental websites as part of the published proactive disclosure reports in accordance with [Contracting Policy Notice: 2019-01](#) and the [Guidelines on the Proactive Disclosure of Contracts](#).

Work Force Adjustment Directive

Is the Bidder a FPS who received a lump sum payment pursuant to the terms of the Work Force Adjustment Directive? **Yes () No ()**

If so, the Bidder must provide the following information:

- a. name of former public servant;
- b. conditions of the lump sum payment incentive;
- c. date of termination of employment;
- d. amount of lump sum payment;
- e. rate of pay on which lump sum payment is based;
- f. period of lump sum payment including start date, end date and number of weeks;
- g. number and amount (professional fees) of other contracts subject to the restrictions of a work force adjustment program.

2.4 Enquiries - Bid Solicitation

All enquiries must be submitted in writing to the Contracting Authority no later than five calendar days before the bid closing date. Enquiries received after that time may not be answered.

Bidders should reference as accurately as possible the numbered item of the bid solicitation to which the enquiry relates. Care should be taken by Bidders to explain each question in sufficient detail in order to enable Canada to provide an accurate answer. Technical enquiries that are of a proprietary nature must be clearly marked "proprietary" at each relevant item. Items identified as "proprietary" will be treated as such except where Canada determines that the enquiry is not of a proprietary nature. Canada may edit the question(s) or may request that the Bidder do so, so that the proprietary nature of the question(s) is eliminated, and the enquiry can be answered to all Bidders. Enquiries not submitted in a form that can be distributed to all Bidders may not be answered by Canada.

2.5 Applicable Laws

Any resulting contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario.

Bidders may, at their discretion, substitute the applicable laws of a Canadian province or territory of their choice without affecting the validity of their bid, by deleting the name of the Canadian province or territory specified and inserting the name of the Canadian province or territory of their choice. If no change is made, it acknowledges that the applicable laws specified are acceptable to the Bidders.

2.6 Bid Challenge and Recourse Mechanisms

- (a) Several mechanisms are available to potential suppliers to challenge aspects of the procurement process up to and including contract award.

- (b) Canada encourages suppliers to first bring their concerns to the attention of the Contracting Authority. Canada's [Buy and Sell](#) website, under the heading "[Bid Challenge and Recourse Mechanisms](#)" contains information on potential complaint bodies such as:
- Office of the Procurement Ombudsman (OPO)
 - Canadian International Trade Tribunal (CITT)
- (c) Suppliers should note that there are **strict deadlines** for filing complaints, and the time periods vary depending on the complaint body in question. Suppliers should therefore act quickly when they want to challenge any aspect of the procurement process.

PART 3 - BID PREPARATION INSTRUCTIONS

3.1 Bid Preparation Instructions

Due to the nature of the bid solicitation, bids transmitted by epost Connect service and by facsimile will not be accepted.

Canada requests that bidders provide their bid in separately bound sections as follows:

- Section I: Technical Bid (1 electronic copy)
- Section II: Financial Bid (1 electronic copy)
- Section III: Certifications (1 electronic copy)

Prices must appear in the financial bid only. No prices must be indicated in any other section of the bid.

Canada requests that bidders follow the format instructions described below in the preparation of their bid:

- (a) Use letter size format;
- (b) Use a font size of at least equivalent to Arial 10 or Times New Roman 11;
- (c) use a numbering system that corresponds to the bid solicitation.

Section I: Technical Bid

In their technical bid, Bidders should explain and demonstrate how they propose to meet the requirements and how they will carry out the Work. Bidders should demonstrate their capability and describe their approach in a thorough, concise and clear manner for carrying out the work.

The technical bid should address clearly and in sufficient depth the points that are subject to the evaluation criteria against which the bid will be evaluated. Simply repeating the statement contained in the bid solicitation is not sufficient. In order to facilitate the evaluation of the bid, Canada requests that bidders address and present topics in the order of the evaluation criteria under the same headings.

Section II: Financial Bid

Bidders must submit their financial bid in accordance with the Basis of Payment in Annex B.

3.1.1 Exchange Rate Fluctuation C3011T (2013-11-06)

The requirement does not offer exchange rate fluctuation risk mitigation. Requests for exchange rate fluctuation risk mitigation will not be considered. All bids including such provision will render the bid non-responsive.

Section III: Certifications

Bidders must submit the certifications and additional information required under Part 5.

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

4.1 Evaluation Procedures

- (a) Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria.
- (b) An evaluation team composed of representatives of Canada will evaluate the bids.

4.1.1 Technical Evaluation

Definitions

For the purpose of this RFP, the following definitions apply to the requirements:

“Assignment”: A set of tasks and amount of work assigned to someone as part of a job.

“Developing Countries”: Countries listed under DAC list of Official Development Assistance (ODA) Recipients: <http://www.oecd.org/dac/stats/daclist.htm>.

“Development Evaluation”: The systematic and objective assessment of an on-going or completed development intervention, its design, implementation and results. In the development context, evaluation refers to the process of determining the worth or significance of a development intervention. (OECD/DAC (2010) *Quality Standards for Development Evaluation*, OECD, Paris). The guidelines and references can be found at: <http://www.oecd.org/development/evaluation/qualitystandardsfordevelopmentevaluation.htm>.

“Development Intervention”: A general term for any activity, project, programme, strategy, policy, theme, sector, instrument, modality, institutional performance, etc., aimed to promote development. (OECD/DAC (2010) *Quality Standards for Development Evaluation*, OECD, Paris).

“Development Evaluation Assignment”: A set of tasks and amount of work assigned to a person or a team for the conduct of a development evaluation as specified in a document usually called “Terms of Reference,” presenting the purpose, scope, and objectives of the evaluation; the evaluation questions or issues; the resources and time allocated; reporting requirements; and any other expectations regarding the evaluation process and products. This document can alternatively be called “scope of work” or “evaluation mandate”. (OECD/DAC (2010) *Quality Standards for Development Evaluation*, OECD, Paris).

“Evaluand(s)”: The object(s) of an evaluation. This can be either a single project/program or a group of projects within a program.

“International Development”: The objective of promoting sustainable development in developing countries in order to reduce poverty and contribute to a more secure, equitable and prosperous world.

“Recognized Education Institution”: Defined as a public, non-governmental or private entity that has been given full or limited authority to grant degrees by an act of the relevant legislature.

“Review”: The periodic or ad hoc, often rapid assessment, of an undertaking’s performance that does not apply the due process of evaluation. Reviews tends to emphasize operational issues. (United Nations Evaluation Group (2016). *Norms and Standards for Evaluation*. New York: UNEG). **Note:** Operational, annual or sector specialist reviews are not considered development evaluations.

West Africa: consists of Benin, Burkina Faso, Cape Verde, The Gambia, Ghana, Guinea, Guinea-Bissau, Ivory Coast, Liberia, Mali, Mauritania, Niger, Nigeria, Senegal, Sierra Leone and Togo

Francophone countries in West Africa: Benin, Burkina Faso, Guinea, Ivory Coast, Mali, Mauritania, Niger, Senegal, Togo.

4.1.1.1 Mandatory Technical Criteria

	MANDATORY TECHNICAL CRITERIA	Met / Not Met
M1	<p>Evaluation Team Leader</p> <p>Using Annex E, form TECH-4 - <i>Bidder / Evaluation Personal Experience – Development Evaluation Assignment Conducted by Proposed Evaluation Personnel</i>, the Bidder must submit two (2) completed Assignments, demonstrating that the proposed Evaluation Team Leader has led, managed and conducted (all three phases of evaluation: design, implementation and reporting) two (2) Development Evaluation Assignments as defined above in the definitions and with the following characteristics.</p> <p>Each Development Evaluation Assignment must have:</p> <ul style="list-style-type: none"> (i) been completed within fifteen (15) years of RFP Closing Date; (ii) a contract value of CAD\$ 80,000 or more; (iii) a duration of at least three (3) months; (iv) an Evaluand value of CAD \$1 million or more; (v) an Evaluand Time Period covered by the Development Evaluation Assignment of two (2) years or more; (vi) data collection involving at least two (2) different types of stakeholder groups; (vii) been led, managed and conducted (all three phases of evaluation: design, implementation and reporting) by the proposed Evaluation Team Leader. That is, the Evaluation Team Leader that conducted the Development Evaluation Assignment must be the same as the proposed Evaluation Team Leader for the present mandate; (viii) a level of effort of at least 20 days specifically for the Evaluation Team Leader; (ix) an Evaluation Team Leader that supervised at least one (1) professional staff. 	

4.1.1.2 Point Rated Technical Criteria

ITEM	RATED TECHNICAL CRITERIA	POINTS
	PROPOSED PERSONNEL	
R1	<p>Evaluation Team Leader</p> <p>Thematic Experience (maximum 36 points):</p> <p>Using Annex E, form TECH 6A – <i>Curriculum Vitae for Proposed Personnel</i>, the Bidder should identify no more than five (5) completed Assignments that demonstrate the proposed Evaluation Team Leader has the following experience. Each Assignment must have at least 20 days of level of effort and have been completed within 15 years of the closing date of this RFP.</p> <p>The cumulative experience will be evaluated using all assignments together, so each assignment does not need to cover all elements. Points will be awarded as follows:</p> <ol style="list-style-type: none"> 1. Experience in one or more relevant sectors to the evaluation in this RFP (ie agribusiness, agricultural value chains, gender equality, business development services, international development evaluation data analysis or research, or SME programming): <ul style="list-style-type: none"> • 1 sector: 3 point • 2 sectors: 6 points • 3 sectors: 9 points • More then 3 sectors : 12 points 	/12

	<p>2. Assignment was for a contract value greater than CAD\$ 145,000.00 and an evaluand budget greater than CAD\$ 10,000,000.00. : 6 points</p>	/6
	<p>3. Geographic experience in West Africa or Ethiopia):</p> <ul style="list-style-type: none"> • 1 country : 6 point • 2 countries: 12 points • 3 countries or more: 18 points 	/18
R2	<p>Agri-business, Value Chain, Business Development Services Experience – (maximum 54 points)</p> <p>Using Annex E, form TECH 6A - <i>Curriculum Vitae for Proposed Personnel</i>, the Bidder should demonstrate that the proposed team has Agri-business, Value Chain and Business Development Services Experience as follows:</p> <p>The Bidder should identify no more than eight (8) completed Assignments among team members that demonstrate the proposed resource(s) has(ve) provided technical expertise focusing on Agri-business, value chains and Business Development Services in the context of international development projects. Each Assignment must have been at least 15 days of level of effort and been completed within 15 years of the closing date of this RFP.</p> <p>The experience will be evaluated using all assignments together, so each assignment does not need to cover all elements. Points will be awarded for each of the following elements that are demonstrated, as follows:</p>	
	<p>1. Experience in planning, design or implementation of agri-business and value-chain projects, programs, strategies or policies: 6 points</p>	/6
	<p>2. Experience in planning, design, or implementation of Business Development Services projects, programs, strategies or policies: 6 points;</p>	/6
	<p>3. Experience conducting agri-business and value-chain analysis or research: 6 points</p>	/6
	<p>4. Experience conducting Business Development Services analysis or research: 6 points</p>	/6
	<p>5. Experience in the evaluation of agri-business and value-chain programming including developing evaluation criteria, questions, methods or reports. 9 points</p>	/9
	<p>6. Experience in the evaluation of Business Development Services programming including developing evaluation criteria, questions, methods or reports. 9 points</p>	/9
	<p>7. Experience in programming that targets small and medium size enterprises. 6 points</p>	/6
	<p>8. Experience in agriculture or business in francophone West Africa or Ethiopia. 6 points (3 point per country, maximum of 6 points)</p>	/6
R3	<p>Gender Equality Expertise (maximum 30 points)</p> <p>Using Annex E, form TECH 6A - <i>Curriculum Vitae for Proposed Personnel</i>, the Bidder should demonstrate that one member of the proposed Core Evaluation Team has Gender Equality Expertise as follows:</p>	
	<p>A. Education (maximum 6 points)</p> <p>The proposed resource with Gender Equality technical expertise has a degree with a specialty in Gender Equality issues or equivalent issued from a Recognized Education Institution. Points will be awarded as follows:</p> <ul style="list-style-type: none"> • An under-graduate or graduate degree or professional certification related to Gender Equality: 6 points 	/6

	<p>B. Cumulative Experience (maximum 24 points)</p> <p>The Bidder should identify no more than five (5) completed Assignments that demonstrate the proposed resource with Gender Equality Expertise has provided technical expertise focusing on Gender Equality in the context of international development projects. Each Assignment must have at least 10 days of level of effort and been completed within 15 years of the closing date of this RFP.</p> <p>The cumulative experience will be evaluated using all assignments together, so each assignment does not need to cover all elements. Points will be awarded for each of the following elements that are demonstrated, as follows:</p>	
	<p>1. Experience in planning, design or implementation of gender equality projects, programs, strategies or policies 6 points;</p>	/6
	<p>2. Experience with both strategic research and analysis of gender equality projects, programs, strategies or policies 6 points;</p>	/6
	<p>3. Experience in integrating gender equality into agri-business and value chains programs, strategies, or policies 6 points;</p>	/6
	<p>4. Experience in ensuring evaluation criteria, questions, methods and reports integrate gender equality considerations 6 points</p>	/6
R4	<p>Quantitative Data Analysis Expertise (maximum 18 points)</p> <p>Using Annex E, Form TECH 6A - <i>Curriculum Vitae for Proposed Personnel</i>, the Bidder should demonstrate that one member of the proposed Core Evaluation Team has Quantitative Data Analysis Expertise as follows:</p>	
	<p>A. Education (maximum 6 points)</p> <p>The proposed resource with Quantitative Data Analysis Expertise has a degree in quantitative data analysis or a related field such as statistics issued from a Recognized Education Institution. Points will be awarded as follows:</p> <ul style="list-style-type: none"> A diploma or under-graduate or graduate degree in quantitative data analysis or a related field such as statistics: 6 points 	/6
	<p>B. Cumulative Experience (maximum 12 points)</p> <p>The Bidder should identify no more than five (5) completed Assignments that demonstrate the proposed resource with Quantitative Data Analysis Expertise has provided technical expertise focusing on quantitative data analysis. Each Assignment must have at least 15 days of level of effort and been completed within 15 years of the closing date of this RFP.</p> <p>The cumulative experience will be evaluated using all assignments together, so each assignment does not need to cover all elements. Points will be awarded for each of the following elements that are demonstrated, as follows: (for a maximum of 12 points):</p>	
	<p>1. Experience with sampling methods and approaches, in particular in defining sample sizes and sample allocations for data collection activities, in a developing country context: 6 points;</p>	/6
	<p>2. Experience with quantitative statistical analysis and frequent application of quantitative analysis software (e.g. R, SPSS, SAS, etc.): 6 points</p>	/6
R5	<p>Qualitative Data Analysis Expertise Experience (maximum 12 points)</p> <p>Using Annex E, form TECH 6A - <i>Curriculum Vitae for Proposed Personnel</i>, the Bidder should demonstrate that one member of the proposed Core Evaluation Team</p>	

	<p>has Qualitative Data Analysis Expertise as follows:</p> <p>The Bidder should identify no more than five (5) completed Assignments that demonstrate the proposed resource with Qualitative Data Analysis Expertise has provided technical expertise focusing on qualitative data analysis. Each Assignment must have at least 15 days of level of effort and been completed within 15 years of the closing date of this RFP.</p> <p>The cumulative experience will be evaluated using all assignments together, so each assignment does not need to cover all elements. Points will be awarded for each of the following elements that are demonstrated, as follows:</p>	
	<p>1. Experience in the design and implementation of qualitative data collection instruments and protocols in a developing country context 6 points;</p>	/6
	<p>2. Experience with qualitative data analysis and frequent application of Qualitative Data Analysis Software (NVIVO, ATLAS.ti, etc.) 6 points</p>	/6
	Sub-total – Personnel	/150
	METHODOLOGY	
R6	<p>Evaluation Approach and Methodology (maximum 110 points)</p> <p>A maximum of six (6) pages will be considered for this requirement.</p> <p>The Bidder should describe their detailed approach and methodology that responds to the services described in the SoW. The Bidder can include these elements in any order, ideally in an integrated manner.</p> <p>The text should include, but is not limited to:</p> <ol style="list-style-type: none"> 1. a clear description of the evaluation approach(es) and methodologies that will be used to conduct the evaluation; 2. a description of how the data collection will be integrated within the overall evaluation; 3. comments on any challenges or issues (e.g. methodological, contextual - including COVID-19, etc.), which might arise in structuring and conducting the evaluation, and suggesting mitigating strategies when applicable. 4. a description on the integration of Gender Equality. <p>For point 4, the following definition applies: "Integration" is understood to mean full consideration of the Gender Equality theme at all stages of the project, program or evaluation. This definition goes beyond simply "addressing the issue" where Gender Equality theme is included only at a high level without in-depth consideration in the project, program or evaluation.</p> <p>The proposed evaluation methodology should be realistic and feasible to meet the evaluation objectives, while taking into account the current COVID-19 situation.</p> <p>The appropriateness of the methodology will be evaluated.</p> <p>The following elements describe the meaning of appropriateness:</p>	
6.1	<p>Understanding of the Statement of Work (maximum 15 points).</p> <p>The description:</p> <ol style="list-style-type: none"> a) Provides concrete and pertinent details to demonstrate the factual understanding of the services described in the SoW. Yes 5 POINTS, No 0 POINTS b) Key elements (e.g. required elements for the work plan, etc.) of the SoW are all included. 	/15

	<p>Yes 5 POINTS, Partial: satisfactory response but missing 1 or more key elements 3 POINTS, No 0 POINTS</p> <p>c) The text is clear, coherent and pertinent and is focused on the practical application rather than a theoretical description. Yes 5 POINTS, Partial: satisfactory response but 1 or more elements are unclear 3 POINTS, No 0 POINTS</p>	
6.2	<p>Proposed evaluation approaches and methodology can be realistically implemented as per the SoW (maximum 35 points).</p> <p>The description:</p> <p>a) Is informed by and explicitly linked to the evaluation mandate as per the SoW. Yes 5 POINTS, Partial: satisfactory response but 1 or more elements are not clearly linked to the evaluation mandate 3 POINTS, No 0 POINTS</p> <p>b) Takes the realities of the local context into methodological considerations and choices (not incompatible with the reality of the local context). Yes 5 POINTS, No 0 POINTS</p> <p>c) Can be realistically operationalized with the proposed organization of the bidder's team (R7) Yes 5 POINTS, No 0 POINTS</p> <p>d) Demonstrates understanding of evaluation approaches or methodologies in line with the requirements as per the SoW. Yes 5 POINTS, Partial: satisfactory response but 1 or more elements are not clearly linked to SoW requirements 3 POINTS, No 0 POINTS</p> <p>e) Includes relevant approaches or methodologies (rather than those that do not respond to the evaluation mandate as per the SoW). Yes 5 POINTS, No 0 POINTS</p> <p>f) Includes key methodological elements indicated in the SoW (e.g. required elements for the work plan, etc.). Yes 5 POINTS, No 0 POINTS</p> <p>g) The text is clear, coherent and pertinent and is focused on the practical application rather than a theoretical description. Yes 5 POINTS, Partial: satisfactory response but 1 or more elements are unclear or more theoretical than practical 3 POINTS, No 0 POINTS</p>	/35
6.3	<p>Data collection and analysis methods/tools are linked to the evaluation questions to ensure triangulation (maximum 35 points):</p> <p>The description:</p> <p>a) Provides concrete and pertinent details – taking into account challenges and issues specific to this evaluation and suggesting solutions – to demonstrate how the proposed data collection and analysis methods/tools will be linked to evaluation questions and if they ensure triangulation. Yes 5 POINTS, No 0 POINTS</p> <p>b) Takes the realities of the local context into methodological considerations and choices (not incompatible with the reality of the local context). Yes 5 POINTS, No 0 POINTS</p> <p>c) Can be operationalized with the proposed organization of the bidder's team (R7). Yes 5 POINTS, No 0 POINTS</p>	/35

	<p>d) Demonstrates understanding of evaluation methodologies. Yes 5 POINTS, No 0 POINTS</p> <p>e) Includes relevant methodologies (rather than irrelevant methodologies which do not respond to the evaluation mandate as per the SoW). Yes 5 POINTS, No 0 POINTS</p> <p>f) Includes key methodological elements indicated in the SoW (e.g. required elements for the work plan, etc.). Yes 5 POINTS, No 0 POINTS</p> <p>g) The text is clear, coherent and pertinent and is focused on the practical application rather than a theoretical description. Yes 5 POINTS, Partial: satisfactory response but 1 or more elements are unclear or more theoretical than practical 3 POINTS, No 0 POINTS</p>	
<p>6.4</p>	<p>Pragmatic application in fully integrating Gender Equality in all aspects of the evaluation approach and methodology (maximum 25 points).</p> <p>The description:</p> <p>a) Provides concrete and pertinent details to demonstrate whether Gender Equality is fully integrated in all aspects of the evaluation approach and methodology in pragmatic terms. Yes 5 POINTS, Partial: satisfactory response but in 1 or more elements GE is not fully integrated 3 POINTS, No 0 POINTS</p> <p>b) Demonstrates understanding of evaluation methodologies. Yes 5 POINTS, No 0 POINTS.</p> <p>c) Includes relevant methodologies (rather than irrelevant methodologies which do not respond to the evaluation mandate as per the SoW or that are not specific to Gender Equality). Yes 5 POINTS, No 0 POINTS</p> <p>d) Includes key methodological elements indicated in the SoW specific to Gender Equality (e.g. required elements for the work plan, etc.). Yes 5 POINTS, Partial: satisfactory response but 1 or more elements specific to GE are missing 3 POINTS, No 0 POINTS</p> <p>e) The text is clear, coherent and pertinent and is focused on the practical application rather than a theoretical description. Yes 5 POINTS, Partial: satisfactory response but 1 or more elements are unclear or more theoretical than practical 3 POINTS, No 0 POINTS</p>	<p>/25</p>
<p>R7</p>	<p>Organization of Bidder’s Team (maximum 45 points) A maximum of five (5) pages will be considered for this requirement</p> <p>The Bidder should provide:</p> <ol style="list-style-type: none"> 1. An organigram/organization chart illustrating the reporting relationships, together with a description of how such organization of the team structure will ensure the fulfilment of the Evaluation outlined in the SoW. 2. The proposed composition of the entire Bidder’s Team, including the Core Evaluation Team and Additional Specialized and Non-Specialized Personnel. The following information should be provided for each member of the Bidder’s Team: <ul style="list-style-type: none"> • Name of the proposed resource (or state “not yet identified”); • Positions (role/function); • Responsibilities and work tasks (including supervisory) which would be assigned to each individual, including location (country) of work for the 	

	<p>Local Coordinator-Specialists (need not be identified prior to award of contract).</p> <p>3. A work plan (such as a Gantt chart) for fulfilment of the Evaluation outlined in the SoW. The Bidder should include the estimated level of effort of each member of the entire Bidder's Team.</p> <p>Points will be awarded on the following elements:</p>	
R7.1	<p>Based on the organigram/organization explanation, the Bidder demonstrates that:</p> <p>a) The lines of communication, coordination, reporting relationship and accountability among team members are all in line with the proposed approach and methodology and with the SoW. Yes 5 POINTS, No 0 POINTS</p> <p>b) Concrete and pertinent details are provided to demonstrate the alignment. Yes 5 POINTS, Partial: satisfactory response but 1 or more details are missing 3 POINTS, No 0 POINTS</p> <p>c) The information provided is clear, coherent and pertinent. Yes 5 POINTS, Partial: satisfactory response but 1 or more elements are unclear or not pertinent 3 POINTS, No 0 POINTS</p>	/15
R7.2	<p>Based on the proposed composition of the entire Bidder's Team, the bidder demonstrates that:</p> <p>a. The tasks/responsibilities allocated between and among resources of the proposed entire team is in line with the proposed approach and methodology submitted for R6 and with the SoW. Yes 5 POINTS, No 0 POINTS</p> <p>b. The information provided is clear, coherent and pertinent. Yes 5 POINTS, Partial: satisfactory response but 1 or more elements are unclear or not pertinent 3 POINTS, No 0 POINTS</p>	/10
R7.3	<p>Based on the detailed work plan (such as a Gantt chart) and explanation including the level of effort between resources and as a team, the Bidder demonstrates that:</p> <p>a) The level of effort in the workplan is in line with the proposed approach and methodology submitted in R6. Yes 5 POINTS, No 0 POINTS</p> <p>b) The level of effort in the workplan is in line with the proposed approach and methodology stated in the SoW. Yes 5 POINTS, No 0 POINTS</p> <p>c) Respects the timelines stated in the SoW. Yes 5 POINTS, No 0 POINTS</p> <p>d) The information provided is clear, coherent and pertinent. Yes 5 POINTS, Partial: satisfactory response but 1 or more elements are unclear or not pertinent 3 POINTS, No 0 POINTS</p>	/20
	Sub-Total - Methodology	/155
	Total Rated Technical Criteria	/305
	The minimum pass mark for the rated technical criteria is 65%	198

4.2 Basis of Selection A0027T (2012-07-16) Highest Combined Rating of Technical Merit and Price

1. To be declared responsive, a bid must:
 - a. comply with all the requirements of the bid solicitation; and
 - b. meet all mandatory criteria; and
 - c. obtain the required minimum of 198 points overall for the technical evaluation criteria which are subject to point rating.
The rating is performed on a scale of 305 points.
 - d. the financial proposal must not exceed \$145,000.00CAD, excluding applicable taxes.
2. Bids not meeting (a), (b), (c) or (d) will be declared non-responsive.
3. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 70% for the technical merit and 30% for the price.
4. To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of 70%.
5. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 30%.
6. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.
7. Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract.

The table below illustrates an example where all three bids are responsive and the selection of the contractor is determined by a 70/30 ratio of technical merit and price, respectively. The total available points for technical equals 135 and the lowest evaluated price is \$45,000.

Basis of Selection - Highest Combined Rating Technical Merit (70%) and Price (30%)				
		Bidder 1	Bidder 2	Bidder 3
Overall Technical Score		115/135	89/135	92/135
Bid Evaluated Price		\$55,000.00	\$50,000.00	\$45,000.00
Calculations	Technical Merit Score	$115/135 \times 70 = 59.63$	$89/135 \times 70 = 46.15$	$92/135 \times 70 = 47.70$
	Pricing Score	$45,000/55,000 \times 30 = 24.55$	$45,000/50,000 \times 30 = 27.00$	$45,000/45,000 \times 30 = 30.00$
Combined Rating		84.18	73.15	77.70
Overall Rating		1st	3rd	2nd

In the example above, Bidder 1 obtained the highest combined rating (84.18). In the event where two responsive bids or more have the same highest combined rating of technical merit and price, the responsive bid that obtained the highest overall score for all the point rated technical criteria detailed in Part 4 will be recommended for the award of a contract.

PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

Bidders must provide the required certifications and additional information to be awarded a contract.

The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Unless specified otherwise, Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.

The Contracting Authority will have the right to ask for additional information to verify the Bidder's certifications. Failure to comply and to cooperate with any request or requirement imposed by the Contracting Authority will render the bid non-responsive or constitute a default under the Contract.

5.1 Certifications Required with the Bid

Bidders must submit the following duly completed certifications as part of their bid.

5.1.1 Integrity Provisions - Declaration of Convicted Offences

In accordance with the Integrity Provisions of the Standard Instructions, all bidders must provide with their bid, **if applicable**, the declaration form available on the [Forms for the Integrity Regime](http://www.tpsgc-pwgsc.gc.ca/ci-if/declaration-eng.html) website (<http://www.tpsgc-pwgsc.gc.ca/ci-if/declaration-eng.html>), to be given further consideration in the procurement process.

5.2 Certifications Precedent to Contract Award and Additional Information

The certifications and additional information listed below should be submitted with the bid, but may be submitted afterwards. If any of these required certifications or additional information is not completed and submitted as requested, the Contracting Authority will inform the Bidder of a time frame within which to provide the information. Failure to provide the certifications or the additional information listed below within the time frame provided will render the bid non-responsive.

5.2.1 Integrity Provisions – Required Documentation

In accordance with the section titled Information to be provided when bidding, contracting or entering into a real property agreement of the [Ineligibility and Suspension Policy](http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html) (<http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html>), the Bidder must provide the required documentation, as applicable, to be given further consideration in the procurement process.

5.2.2 Federal Contractors Program for Employment Equity - Bid Certification

By submitting a bid, the Bidder certifies that the Bidder, and any of the Bidder's members if the Bidder is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "FCP Limited Eligibility to Bid" list available at the bottom of the page of the [Employment and Social Development Canada \(ESDC\) - Labour's](https://www.canada.ca/en/employment-social-development/canada/esdc-labour) website (<https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html#>).

Canada will have the right to declare a bid non-responsive if the Bidder, or any member of the Bidder if the Bidder is a Joint Venture, appears on the "FCP Limited Eligibility to Bid" list at the time of contract award.

5.2.3 Additional Certifications Precedent to Contract Award

5.2.3.1 Status and Availability of Resources

The Bidder certifies that, should it be awarded a contract as a result of the bid solicitation, every individual proposed in its bid will be available to perform the Work as required by Canada's representatives and at the time specified in the bid solicitation or agreed to with Canada's representatives. If for reasons beyond its control, the Bidder is unable to provide the services of an individual named in its bid, the Bidder may propose a substitute with similar qualifications and experience. The Bidder must advise the Contracting Authority of the reason for the substitution and provide the name, qualifications and experience of the proposed replacement. For the purposes of this clause, only the following reasons will be considered as

beyond the control of the Bidder: death, sickness, maternity and parental leave, retirement, resignation, dismissal for cause or termination of an agreement for default.

If the Bidder has proposed any individual who is not an employee of the Bidder, the Bidder certifies that it has the permission from that individual to propose his/her services in relation to the Work to be performed and to submit his/her résumé to Canada. The Bidder must, upon request from the Contracting Authority, provide a written confirmation, signed by the individual, of the permission given to the Bidder and of his/her availability

5.2.3.2 Education and Experience A3010T (2010-08-16)

The Bidder certifies that all the information provided in the résumés and supporting material submitted with its bid, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Bidder to be true and accurate. Furthermore, the Bidder warrants that every individual proposed by the Bidder for the requirement is capable of performing the Work described in the resulting contract

PART 6 - RESULTING CONTRACT CLAUSES

The following clauses and conditions apply to and form part of any contract resulting from the bid solicitation.

6.1 Security Requirements

6.1.1 There is no security requirement applicable to the Contract.

6.2 Statement of Work

The Contractor must perform the Work in accordance with the Statement of Work at Annex "A".

6.2.1 Work Authorization

Despite any other condition of the Contract, the Contractor is only authorized to perform the Work required to complete PHASE ONE, of the Contract. Upon completion of PHASE ONE the Work will be reviewed before the Contractor is authorized to commence any Work for PHASE TWO. Depending on the results of the review and evaluation of the Work, Canada will decide at its discretion whether to continue with the Work. The Contractor must immediately comply with the notice

If Canada decides to continue with PHASE TWO, of the Contract, the Contracting Authority will advise the Contractor in writing to commence work on PHASE TWO.. Upon completion of PHASE TWO, the Work will be reviewed before the Contractor is authorized to commence any Work for PHASE THREE. Depending on the results of the review and evaluation of the Work, Canada will decide at its discretion whether to continue with the Work. The Contractor must immediately comply with the notice

If Canada decides to continue with PHASE THREE, of the Contract, the Contracting Authority will advise the Contractor in writing to commence work on PHASE THREE. The Contractor must immediately comply with the notice

If Canada decides not to proceed with PHASE TWO or PHASE THREE, the Contracting Authority will advise the Contractor in writing of the decision and the Contract will be considered completed at no further costs to Canada. In no event will the Contractor be paid for any cost incurred for unauthorized work.

6.3 Standard Clauses and Conditions

All clauses and conditions identified in the Contract by number, date and title are set out in the [Standard Acquisition Clauses and Conditions Manual](https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual) (https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual) issued by Public Works and Government Services Canada.

6.3.1 General Conditions

[2010B](#) (2020-05-28), General Conditions - Professional Services (Medium Complexity) apply to and form part of the Contract.

6.3.2 Insurance – Specific Requirements G1001C (2013-11-06)

The Contractor must comply with the insurance requirements specified in Annex D. The Contractor must maintain the required insurance coverage for the duration of the Contract. Compliance with the insurance requirements does not release the Contractor from or reduce its liability under the Contract.

The Contractor is responsible for deciding if additional insurance coverage is necessary to fulfill its obligation under the Contract and to ensure compliance with any applicable law. Any additional insurance coverage is at the Contractor's expense, and for its own benefit and protection.

The Contractor must forward to the Contracting Authority within ten (10) days after the date of award of the Contract, a Certificate of Insurance evidencing the insurance coverage and confirming that the insurance policy complying with the requirements is in force. For Canadian-based Contractors, coverage must be placed with an Insurer licensed to carry out business in Canada, however, for Foreign-based Contractors, coverage must be placed with an Insurer with an A.M. Best Rating no less than "A-". The

Contractor must, if requested by the Contracting Authority, forward to Canada a certified true copy of all applicable insurance policies.

6.4 Term of Contract A9022C (2007-05-25) (TO BE INSERTED AT CONTRACT AWARD)

6.4.1 Period of the Contract

The period of the Contract is from Contract Award to _____ inclusive

6.5 Authorities (TO BE INSERTED AT CONTRACT AWARD)

6.5.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: _____

Title: _____

Telephone: ____ - ____ - _____

E-mail address: _____

The Contracting Authority is responsible for the management of the Contract and any changes to the Contract must be authorized in writing by the Contracting Authority. The Contractor must not perform work in excess of or outside the scope of the Contract based on verbal or written requests or instructions from anybody other than the Contracting Authority.

6.5.2 Technical Authority

The Technical Authority for the Contract is:

Name: _____

Title: _____

Telephone: ____ - ____ - _____

E-mail address: _____

The Technical Authority is the representative of the department or agency for whom the Work is being carried out under the Contract and is responsible for all matters concerning the technical content of the Work under the Contract. Technical matters may be discussed with the Technical Authority, however the Technical Authority has no authority to authorize changes to the scope of the Work. Changes to the scope of the Work can only be made through a contract amendment issued by the Contracting Authority.

6.5.3 Contracting Transaction Authority

The Contracting Transaction Authority for the Contract is:

Name: _____

Title: _____

Telephone: ____ - ____ - ____

E-mail address: _____

The Contracting Transaction Authority is responsible for the management of the solicitation and the administration of the Contract,

6.5.4 Contractor's Representative

Name: _____

Title: _____

Organization: _____

Address: _____

Telephone: ____ - ____ - ____

E-mail: _____.

6.6 Proactive Disclosure of Contracts with Former Public Servants - A3025C (2020-05-04)

By providing information on its status, with respect to being a former public servant in receipt of a [Public Service Superannuation Act](#) (PSSA) pension, the Contractor has agreed that this information will be

reported on departmental websites as part of the published proactive disclosure reports, in accordance with [Contracting Policy Notice: 2019-01](#) of the Treasury Board Secretariat of Canada.

A3025T (2020-05-04) Former Public Servant - Competitive Bid

Contracts awarded to former public servants (FPS) in receipt of a pension or of a lump sum payment must bear the closest public scrutiny, and reflect fairness in the spending of public funds. In order to comply with Treasury Board policies and directives on contracts awarded to FPSs, bidders must provide the information required below before contract award. If the answer to the questions and, as applicable the information required have not been received by the time the evaluation of bids is completed, Canada will inform the Bidder of a time frame within which to provide the information. Failure to comply with Canada's request and meet the requirement within the prescribed time frame will render the bid non-responsive.

Definitions

For the purposes of this clause, "former public servant" is any former member of a department as defined in the [Financial Administration Act](#), R.S., 1985, c. F-11, a former member of the Canadian Armed Forces or a former member of the Royal Canadian Mounted Police. A former public servant may be:

- a. an individual;
- b. an individual who has incorporated;
- c. a partnership made of former public servants; or
- d. a sole proprietorship or entity where the affected individual has a controlling or major interest in the entity.

"lump sum payment period" means the period measured in weeks of salary, for which payment has been made to facilitate the transition to retirement or to other employment as a result of the implementation of various programs to reduce the size of the Public Service. The lump sum payment period does not include the period of severance pay, which is measured in a like manner.

"pension" means a pension or annual allowance paid under the [Public Service Superannuation Act](#) (PSSA), R.S., 1985, c. P-36, and any increases paid pursuant to the [Supplementary Retirement Benefits Act](#), R.S., 1985, c. S-24 as it affects the PSSA. It does not include pensions payable pursuant to the [Canadian Forces Superannuation Act](#), R.S., 1985, c. C-17, the [Defence Services Pension Continuation Act](#), 1970, c. D-3, the [Royal Canadian Mounted Police Pension Continuation Act](#), 1970, c. R-10, and the [Royal Canadian Mounted Police Superannuation Act](#), R.S., 1985, c. R-11, the [Members of Parliament Retiring Allowances Act](#), R.S. 1985, c. M-5, and that portion of pension payable to the [Canada Pension Plan Act](#), R.S., 1985, c. C-8.

Former Public Servant in Receipt of a Pension

As per the above definitions, is the Bidder a FPS in receipt of a pension? **Yes () No ()**

If so, the Bidder must provide the following information, for all FPSs in receipt of a pension, as applicable:

- a. name of former public servant;
- b. date of termination of employment or retirement from the Public Service.

By providing this information, Bidders agree that the successful Bidder's status, with respect to being a former public servant in receipt of a pension, will be reported on departmental websites as part of the published proactive disclosure reports in accordance with [Contracting Policy Notice: 2019-01](#) and the [Guidelines on the Proactive Disclosure of Contracts](#).

Work Force Adjustment Directive

Is the Bidder a FPS who received a lump sum payment pursuant to the terms of the Work Force Adjustment Directive? **Yes () No ()**

If so, the Bidder must provide the following information:

- a. name of former public servant;
- b. conditions of the lump sum payment incentive;
- c. date of termination of employment;

- d. amount of lump sum payment;
- e. rate of pay on which lump sum payment is based;
- f. period of lump sum payment including start date, end date and number of weeks;
- g. number and amount (professional fees) of other contracts subject to the restrictions of a work force adjustment program.

6.7 Payment

6.7.1 Basis of Payment C0213C (2018-04-17) Firm Price - Services

In consideration of the Contractor satisfactorily completing all of its obligations under the Contract, the Contractor will be paid a firm price, as specified in Annex B – Basis of Payment, Table 1- Schedule of Milestones, for a cost of \$ (**TO BE INSERTED AT CONTRACT AWARD**). Customs duties are excluded and Applicable Taxes are extra.

6.7.2 Milestone Payments - Not subject to holdback H3010C (2016-01-28)

Canada will make milestone payments in accordance with the Schedule of Milestones detailed in the Contract and the payment provisions of the Contract if:

- a. an accurate and complete claim for payment using [PWGSC-TPSGC 1111](#), Claim for Progress Payment, and any other document required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- b. all the certificates appearing on form [PWGSC-TPSGC 1111](#) have been signed by the respective authorized representatives;
- c. all work associated with the milestone and as applicable any deliverable required has been completed and accepted by Canada.

6.7.3 Limitation of Price (C6000C (2017-08-17))

Canada will not pay the Contractor for any design changes, modifications or interpretations of the Work unless they have been approved, in writing, by the Contracting Authority before their incorporation into the Work.

6.8 Invoicing Instructions

Progress Payment Claim - Supporting Documentation required

1. The Contractor must submit a claim for payment using form [PWGSC-TPSGC 1111](#), Claim for progress Payment.

Each claim must show:

- a. all information required on form [PWGSC-TPSGC 1111](#);
 - b. all applicable information detailed under the section entitled "Invoice Submission" of the general conditions;
 - c. the description and value of the milestone claimed as detailed in the Contract;
 - d. the following codes:
 - Purchase order:
 - WBS Element:
 - GL Acct/ CC/ Fund:
 - Vendor:
2. Applicable Taxes must be calculated on the total amount of the claim before the holdback is applied. At the time the holdback is claimed, there will be no Applicable Taxes payable as it was claimed and payable under the previous claims for progress payments.
 3. The Contractor must prepare and certify one original copy of the claim on form [PWGSC-TPSGC 1111](#), and forward it to the Technical Authority and Contracting Transaction Authority identified under the section entitled "Authorities" of the Contract for appropriate certification after inspection and acceptance of the Work takes place.
The Technical Authority will then forward the original copy of the claim to the Contracting

Authority for certification and onward submission to the Payment Office for the remaining certification and payment action.

4. The Contractor must not submit claims until all work identified in the claim is completed.

6.9 Certifications and Additional Information

6.9.1 Compliance

Unless specified otherwise, the continuous compliance with the certifications provided by the Contractor in its bid or precedent to contract award, and the ongoing cooperation in providing additional information are conditions of the Contract and failure to comply will constitute the Contractor in default. Certifications are subject to verification by Canada during the entire period of the Contract.

6.10 Applicable Laws

The Contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in (**TO BE INSERTED AT CONTRACT AWARD**)

6.11 Priority of Documents

If there is a discrepancy between the wording of any documents that appear on the list, the wording of the document that first appears on the list has priority over the wording of any document that subsequently appears on the list.

- (a) the Articles of Agreement;
- (b) the general conditions 2010B (2020-05-28), General Conditions - Professional Services (Medium Complexity);
- (c) Annex A, Statement of Work;
- (d) Annex B, Basis of Payment;
- (e) Annex C, Security Requirements Check List;
- (f) Annex D, Insurance Requirement;
- (g) the Contractor's bid dated _____ (*insert date of bid*) (*If the bid was clarified or amended, insert at the time of contract award: “, as clarified on _____” or “, as amended on _____” and insert date(s) of clarification(s) or amendment(s)*)

6.12 Dispute Resolution

- (a) The parties agree to maintain open and honest communication about the Work throughout and after the performance of the contract.
- (b) The parties agree to consult and co-operate with each other in the furtherance of the contract and promptly notify the other party or parties and attempt to resolve problems or differences that may arise.
- (c) If the parties cannot resolve a dispute through consultation and cooperation, the parties agree to consult a neutral third party offering alternative dispute resolution services to attempt to address the dispute.
- (d) Options of alternative dispute resolution services can be found on Canada's Buy and Sell website under the heading "Dispute Resolution".

ANNEX A STATEMENT OF WORK

FOR THE

SUMMATIVE EVALUATION

OF THE

**ENHANCING FARMERS' ACCESS TO MARKETS
IN EAST AND WEST AFRICA**

Project Number: P-000103-001

**Pan Africa Regional Development Program
WGM – Sub-Saharan Africa
Department of Foreign Affairs, Trade and Development Canada**

List of acronyms

AMEA	Market Ecosystem Alliance
DFATD	Department of Foreign Affairs, Trade and Development
FCDO	Foreign, Commonwealth and Development Office
GAFSP	Global Agriculture and Food Security Program
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit
HQ	Headquarters
ICT	Information and communication technologies
IFC	International Finance Corporation
NORAD	Norwegian Agency for Development Cooperation
PMF	Performance Measurement Framework
SME	Small and medium enterprise
SIDA	Swedish International Development Agency
SOFITEX	Société Burkinabè des Fibres Textiles
SOW	Statement of Work
TA	Technical Authority

1 Rationale, purpose and Specific objectives of the evaluation

1.1 Rationale and Purpose of the Evaluation

Among the first bilateral donors to create a Pan-Africa and Regional Development Program, Canada understands the importance of a regional approach in advancing development objectives. Canada's Pan-African and regional approach includes supporting initiatives in multiple African countries with potential for economies of scale or innovation breakthroughs that promote knowledge sharing and collaboration, with a focus on gender equality. It also works in African countries where Canada has limited bilateral funding.

It is in this context that Canada decided to fund the Enhancing Farmers' Access to Markets in East and West Africa Project, a project that started in January 2014 and is scheduled to end December 2022. The Project is being implemented by the International Financial Corporation (IFC) and is on track to achieve the targets set out in its revised Performance Measurement Framework (PMF). The Project is comprised of 16 sub-projects in various stages of implementation, including 5 that were terminated early and 4 that were completed by December 2019.

With several of the sub-projects already completed, Department of Foreign Affairs, Trade and Development (DFATD) would like to conduct an evaluation with the following purpose:

- To learn about the approaches used by IFC to increase small-scale, men and women smallholder farmers' access to local, regional, and international markets¹; and
- To inform DFATD, IFC, and others working to strengthen agribusinesses and related value chains so that they can improve new or existing programming in this sector.

The intended end users of this evaluation are East and West African project stakeholders, IFC and DFATD.

1.2 Specific Objectives of the Evaluation

The Contractor will evaluate three specific sub-projects (see section 2.3 **Evaluation Scope**). The specific objectives of the summative evaluation are to:

- Assess the results obtained through the different approaches used by IFC to enhance agribusiness value chains and smallholder farmers' access to markets through the three sub-projects.
- Assess how the three sub-projects outcomes contributed to the overall project outcomes.
- Assess the three focus sub-projects in terms of relevance and sustainability of their results.
- Assess the effects of COVID-19 on the sub-projects, including if there has been an impact on the results of completed sub-projects.
- Assess how each of the three sub-projects has affected targeted men and women smallholder farmers, perhaps in different ways, in terms of social and economic impacts.
- Identify best practices and lessons drawn from the three focus sub-projects.
- Provide findings, conclusions and recommendations to fulfil the purpose stated above.

2 Background information

The following sub-sections briefly describe the Enhancing Farmers' Access to Market in East and West Africa Project under evaluation, including the project's development context, logic and stakeholders.

2.1 Development Context

In the past decade, Africa's impressive growth rate has translated into notable economic and social progress. The continent has also made some advances in regional integration and collaboration, a pre-requisite for the continent's effective development. Many of its economies, which include a number of landlocked countries, are small, fragmented and seized with significant transboundary issues that are further exacerbated by climate change. Despite significant progress in many areas, Africa still faces numerous challenges.

¹ A description of the approaches is provided in Section 2.2

Sub-Saharan Africa's economic growth has slowed in recent years, due in part to a high dependence on commodities. As job growth has not kept pace with economic and population growth, poverty reduction has been slow. Sub-Saharan Africa has one of the highest levels of income inequality in the world. Over 520 million people in the region live in multidimensional poverty, according to the 2017 Global Multidimensional Poverty Index.

Agriculture is central to the livelihoods of most people in Sub-Saharan Africa. It accounts for nearly half of the continent's GDP and employs 60% of its labour force. Agriculture is critical to food security and a catalyst for broad-based sustainable economic growth on the continent. There are an estimated 33 million smallholder farms in Sub-Saharan Africa, which contribute up to 90% of food production in some countries. The World Bank estimates that, by 2030, agriculture could develop into a \$1 trillion industry in the region.

Two main factors stand in the way of the agriculture sector achieving sustainable, broad-based economic growth: low productivity and a lack of competitive, efficient, and regionally integrated agricultural markets. In past years, the focus has been on enhancing agricultural productivity, access to finance, or an enabling environment for business. This has not been accompanied by an equal effort to develop access to more lucrative markets for farmers' products. Access to such markets would allow farmers, as key value chain actors, to sell their produce beyond their local communities, encouraging improved agricultural practices and increased competitiveness, productivity and incomes for them and their families.

Another key issue affecting agricultural productivity is the role of women in the sector. Sub-Saharan women and girls have unequal access to resources and services, and unequal rights related to ownership and property. They play minimal leadership roles, have limited decision-making power, and are affected by harmful traditional practices and gender-based violence. Sub-Saharan Africa has one of the highest gender inequality rankings in the world. Women grow 80 per cent of staple foods in the region but are usually in the lower paying jobs in the supply chains. In commodities like cocoa, tea, and coffee, women are often producers while men sell the crops to traders and control decisions on household finances. Companies will often look to source from established producer groups, yet women are typically under-represented in both membership and governance of these groups.

Canada's Pan-Africa and Regional Development Program supports a regional approach in advancing development objectives in Africa by funding initiatives implemented in multiple African countries with the potential for economies of scale across the region that promote knowledge sharing, collaboration, innovation and gender equality. It also works in countries where Canada has limited bilateral programming. The Enhancing Farmers' Access to Markets in East and West Africa Project was thus a good fit for Program support.

2.2 Evaluation Focus: Description of the Development Intervention

On January 15, 2014, IFC and the Government of Canada signed an administration arrangement creating a Trust Fund of 10 million Canadian dollars. This Fund provides financing for a program of advisory services entitled Enhancing Farmers' Access to Markets in East and West Africa Project (hereon called the Project). The Project's end date is December 31, 2022.

The Project aims to improve the livelihoods of small-scale women and men farmers in East and West Africa by increasing their access to local, regional, and international markets.

Approaches IFC has used to achieve this goal include:

- 1) working with industry stakeholders and farmers to facilitate the adoption of social and environmental trade standards for specific high-value commodities (including coffee, cocoa, palm oil, cashews, cotton, and livestock -goats and poultry) through networking and training; and
- 2) working in partnership with the private sector to integrate women and men smallholder farmers into key agricultural value chains, supporting viable market linkages that could lead to the increased adoption of value-addition technologies and skills.

This project was initially coded as a GE-01 initiative, meaning limited integration of gender considerations, with some gender equality results at the immediate outcome level only. However, following the launch of Canada's Feminist International Assistance Policy (FIAP), IFC has worked to align with the new Policy by

addressing barriers to women's participation and access to resources in the project, and boosting women's representation in decision-making bodies.

The Agribusiness Market Ecosystem Alliance (AMEA) was cofounded by IFC in the context of this and other agribusiness initiatives. It is a global network that brings together various stakeholders to work toward the professionalization of farmer organizations. The AMEA framework offers its members a set of approved capacity building tools founded on the global guidelines for professional farmer organizations, which are consistently improved through a series of feedback loops. AMEA has 26 member organizations at the global level and four local networks in Cote d'Ivoire, Ethiopia, Kenya and Uganda. AMEA has led the process of developing a global standard for professional farmer organizations, with support from the Royal Netherlands Standardization Institute (NEN). It has been recognized by the International Standards Organization (ISO) and published as an International Workshop Agreement (IWA) in March 2019. The targeted sub-projects in this evaluation have benefited directly from AMEA's work.

2.2.1 Logic Model

The Project Logic Model (LM) and the appended Performance Measurement Framework (PMF) were modified over the course of the Project to reflect changes in implementation and indicators due to new realities on the ground, including civil unrest and violence. A summary of the most recent Logic Model is presented below.

The Project's final outcome is:

1000) Improved livelihoods of small-scale women and men farmers in select countries in East and West Africa.

To achieve this ultimate result the Project plans to achieve two intermediate outcomes:

1100) Value chain actors are able to meet the social, environmental and trade standard requirements of high-value commodities in select countries of East and West Africa; and

1200) Improved integration of women and men smallholder farmers in key agricultural value chains based on reliable partnerships with the private sector.

Key immediate outcomes include:

- 1110) Agribusiness industry stakeholders adopt localized guidelines or versions of internationally accepted environmental and social standards for export-oriented commodities in select countries in East and West Africa.
- 1120) Improved regional and national awareness and skills amongst auditors, trainers and certification bodies to support the implementation of environmental and social standards.
- 1130) Women and men smallholder farmers adopt new gender-sensitive farming practices and get certified for environmental & social standards.
- 1210) Women and men smallholder farmers have established relationships with buyers (traders, aggregators, input supplier) through off-take arrangements.
- 1220) Improved marketing power and economies of scale for women and men smallholder farmers.

2.2.2 Sub-projects

The Project is comprised of 16 sub-projects including the Access to Markets Umbrella Program, which provides for overall project management. The following sub-projects have been funded and /or co-funded by the Canadian project:

Table 1: List of DFATD-funded Sub- projects (please note that end dates may have been extended due to the pandemic)

	Project ID	Sub-Project/country	Commodity	Status	Co-Funders	End date (TBC)
1	601329	Cocoa cooperatives, Cameroon	Cocoa	Active	Client and others 51%; Canada 49%	Dec 2020
2	601116	Mixed Product Cooperatives, Côte d'Ivoire	Coffee, cocoa, cotton, cashews	Active	CASA 88% and client cash fees; Canada 12%	June 2021
3	601113	Water Management & Irrigation Project, Burkina Faso	Cotton	Active	GAFSP and ADP ; Canada 33%	June 2021
4	601016	Guinea Bissau Cashew	Cashew	Active	World Bank 52%; Canada 48%	Dec 2020
5	601995	Livestock and Out-grower Development, Ethiopia	Livestock (Goats)	Active	Canada 17%; other donors including FCDO (UK) & Netherlands under GAFSP (52%) and CMAW 20%	March 2021
6	600885	Access to Markets Umbrella Program, regional	All	Active	Canada 100%	June 2019
7	603092	Chicken Agribusiness, Ethiopia	Livestock (Poultry)	Active	Canada 75%; Client 25%	June 2022
8	569407	Coffee, Kenya	Coffee	Completed	GAFSP 96%; Canada 4%	Jul-Dec '14
9	600283	Cocoa Cooperatives, Côte d'Ivoire	Cocoa	Completed	Client and IFC CASA 47%; Canada 53%	Oct 2018
10	600398	Côte d'Ivoire Agribusiness	Cashew	Completed	IFC CASA 47%; Canada 53%	Dec 2019
11	599930	Agricultural Standards Product Development, Ghana	Cocoa	Completed	Client (Armajaro) 83%; Canada 17%	Jul-Dec '14
12	584487	Round Table Sustainable Palm Oil, Ghana	Palm Oil	Terminated	GAFSP 67%, Canada 33%	Jan-Jun '15
13	588867	Round Table Sustainable Palm Oil, Liberia	Palm Oil	Terminated	GAFSP 90%, Canada 10%	Jan-Jun '15
14	588869	Round Table Sustainable Palm Oil, Sierra Leone	Palm Oil	Terminated	GAFSP 99%, Canada 1%	Jan-Jun '15
15	600841	Cocoa 1, Côte d'Ivoire	Cocoa	Terminated	Canada 88%; Client 12%	Jan. 2018
16	602049	Cocoa 2, Côte d'Ivoire	Cocoa	Terminated	Canada 61%; Client 39%	Feb 2018

Status as of November 2019

- *Active = The sub-project is in progress.*
- *Completed = The sub-project concluded as per the schedule and budget; completion reports to be compiled.*
- *Terminated= Discontinued due to market or client related issues.*

Some of the sub-projects were terminated due to civil unrest or other conditions beyond the Project's control or completed earlier than scheduled.

2.2.3 Stakeholders

Stakeholder consultation is fundamental to the design, implementation and evaluation of Canada's development interventions; therefore, the Contractor must ensure that stakeholders are consulted throughout the evaluation process.

Co-operation partners (executing agencies or implementing organizations)

International Finance Corporation (IFC)

The International Finance Corporation (IFC), part of the World Bank Group, is the largest global development institution focused exclusively on the private sector in developing countries. IFC works with more than 2,000 businesses worldwide, using its capital, expertise, and influence to create markets and opportunities in the toughest areas of the world. IFC is a strategic partner with a mandate that

complements Canada's interests in promoting reduction through a deepening engagement with the private sector. Over the past 20 years, Canada has partnered with the IFC to contribute to key results in private sector development, business environment reform, and enhancing the development impact of extractive industries.

While agriculture is a top priority for IFC, with \$4 billion in investments worldwide, this project's focus on access to markets in East and West Africa represents an opportunity to respond to a fundamental gap. In fiscal year 2018, IFC delivered more than \$23 billion in long-term financing for developing countries, leveraging the power of the private sector to end extreme poverty and boost shared prosperity. IFC is uniquely positioned to address this gap by leveraging its substantial portfolio and existing relationships across Africa and across key agricultural value chains. The Project complements other IFC agribusiness programs in areas such as access to finance, storage, post-harvest handling and gender equality.

IFC has been implementing a wide range of agribusiness-related projects in Africa for over 45 years and has gained a strong reputation for this work. The IFC's Africa Department is comprised of approximately 300-400 staffs, posted locally across Africa and in three regional hub offices in Nairobi, Dakar and Johannesburg. Based on its local presence, knowledge and expertise in the agricultural sector in Africa, the IFC was uniquely positioned to implement this project.

IFC also has the advantage of combining investment and advisory services for the agribusiness sector. It provides financing that helps businesses grow quickly, with advice that helps these businesses innovate, raise standards, mitigate risk, be sustainable, and share knowledge across industries and regions. By investing in agribusinesses companies and then using advisory services to reach small-scale farmers, IFC can work across the full agricultural value chain, from farmers to consumers, contributing to sustainability.

Clients

In the context of this project, clients are agribusiness companies that receive IFC financing (debt, equity and other forms of investment) and advisory services. Clients can be local, such as SOFITEX or Luna, or international, such as Cargill and Olam. Funds provided by Canada help strengthen smallholder farmer groups, cooperatives and producer group organizations working (or having the potential to work) with those clients. The advantage of the project's approach is that clients assess market demand and then reach agreements with the smallholder farmers providing specific requirements on product standards, pricing and timing. This provides farmers with a solid basis on which they can calculate their production volumes, costs and potential profits.

Other Partners

IFC works through and with a variety of international and African stakeholders, an approach that varies according to the nature and location of each sub-project. This includes partnerships with industry stakeholders (industry associations, co-operatives, buyers, traders, etc.), key agribusiness and farmer associations, as well as the sub-contracting of specialized consulting companies. A few examples of partnerships:

- SCOPEinsight, based in The Netherlands, has pioneered and developed universally applicable assessment tools and services for measuring and benchmarking the level of professionalism of farmers and farmer organizations in emerging markets.
- The Cargill Foundation with their Cocoa Promise Program and particularly one of its tools: The Coop Academy.
- A partnership between Société Ivoirienne de Banque (SIB), Cargill and IFC launched the Doni –Doni. This is an innovative, award-winning initiative that provides a credit facility which allows cooperatives in Côte d'Ivoire to lease cocoa collection trucks.
- Technoserve has been engaged by IFC to provide specific services to various sub-projects.
- AMEA is supporting the development of international standards for the professional farmer.

Primary stakeholders (direct beneficiaries)

The direct beneficiaries are the women and men smallholder farmers, farmer groups' members, and agribusiness cooperatives' members who are targeted by the Project as indicated in the intermediate outcomes:

- Targeted value chain actors will be able to meet social, environmental and trade standards requirements of selected high-value commodities (coffee, cocoa, palm oil, and cashews) in selected East and West African countries; and
- Targeted women and men smallholder farmers will improve their integration in key agricultural value chains based on reliable partnerships with the private sector.

Co-funding parties

All sub-projects (except for the Access to Markets Umbrella sub-project, which covers regional project management) are co-funded with other parties including IFC, other donors, and IFC's clients. Funders' contribution percentage to each sub-project is noted in the **Table 1** in **Section 2.1.2**. As per DFATD and IFC's agreement, sub-projects results are not prorated based on funding, but 100% attributed to each funder.

Interested Parties

This group encompasses, among others:

- Key donors supporting agriculture in Africa include the World Bank Group, the Gates Foundation, the International Fund for Agricultural Development (IFAD), the European Commission, France, the Swedish International Development Agency (SIDA), NORAD, the United Kingdom Department for International Development (DFID), Germany's GIZ, the Food and Agriculture Organization (FAO), CGIAR institutions, and the United States Agency for International Development.
- Other entities that provide financing to the IFC agribusiness strategic priority include the Global Agriculture and Food Security Program (GAFSP), Swiss State Secretariat for Economic Affairs, DFID, SIDA, and the governments of Japan and the Netherlands.
- Some IFC clients are active participants in the respective national sectoral/processing industry associations. Clients also work with 3rd party certification agencies such as ISQAR, SGS, etc.
- Government agencies and regulatory bodies such as ministries of trade and industry, ministries of agriculture, national cooperative agencies, and national SME agencies may also have a stake in the project implementation and/or outcomes.
- Other stakeholders include those groups of people who may be adversely affected by the intervention and who may emerge during the evaluation process.

2.3 Evaluation Scope

The scope of the evaluation is the three sub-projects that were chosen by DFATD, in collaboration with IFC, according to the following criteria, among others:

- at least one Francophone and one Anglophone country;
- representation from East and West Africa;
- more than one sub-project in the country with varying degrees of success (weak to strong performance);
- Canada has made a relevant contribution, Pan Africa and Regional Development Program field representation at the country's Canadian embassy;
- two of the three sub-projects be completed; and
- the selected sub-projects illustrate different approaches used by IFC to enhance agribusiness value-chains.

Based on these criteria, the three following sub-projects were selected as the focus of this evaluation. *Please note that the selected sub-projects may change based on COVID-19-related travel restrictions and/or data collection limitations.*

- 1) Cocoa Cooperatives, Côte d'Ivoire, (Code 600283 in Table 1). The overall objective of this completed sub-project was to strengthen the performance of 70 cooperatives working one of the

largest cocoa supply chains by reaching out to 50,000 farmers. It helped the establishment of a national training program for 80 cooperative leaders focused on building advanced business management skills through the Agribusiness Leadership Program. This sub-project delivered intensive customized training and coaching to cooperative leaders and quantified the capabilities and professionalism of cooperatives. It also helped 62 high-performing cooperatives to prepare the business and financial documents to access bank financing for new vehicles. It was implemented across the country with cooperatives located from 30 minutes drive to two days travel from Abidjan. The list of cooperatives will be provided to the Contractor.

- 2) Agribusiness, Côte d'Ivoire, (Code 600398 in Table 1). This completed sub-project aimed to unlock opportunities for accessing agri-finance and promoting value addition along the cashew value chain by: a) establishing a public-private dialogue mechanism; b) enacting good practice in relation to warehouse receipt legislation and regulations; c) introducing national traceability standards and guidelines for the cashew sector; and d) introducing environmental and social guidelines for cashew producing. This sub-project worked predominantly with government offices based in Abidjan, although there may be travel required to see the cashew warehouse located outside the city.
- 3) Livestock and Outgrower Development, Ethiopia (Code 601995 in Table 1). The goal of this sub-project, still active, is to support the establishment of the first semi-intensive goat farm in Ethiopia that meets best international practices in terms of production efficiency, environmental sustainability and animal welfare. It aims to set a standard in developing and implementing an effective 5,000 out-growers program with the livestock producers that would be the first backward integration of livestock producers done by a meat exporter in Ethiopia. This sub-project is implemented in two locations: a slaughter house 75 kilometers from Addis Ababa (1 hour drive) and the goat farm located in southern Tigray (50 minutes flight to Mekelle and 2 hours road trip to the district Raya-Zebo, woreda-Mehoni town). Due to COVID 19, this sub-project end date will be delayed by at least a year. Its activities have been constrained by travel restrictions, limitations in data collection for the planned radio program and video development, inability to coach farmers in person, and delays in construction work. In response to the pandemic situation, when feasible, data collection is now being conducted by telephone interviews and a virtual workshop has been held for formative research validation.

3 Evaluation Questions

For each of the three selected sub-projects², the Contractor will address the following questions.

- 1) How did IFC's different approaches to integrating men and women smallholder farmers into the sub-projects' agribusiness value chains contribute to the results obtained? Was there one approach that was particularly effective relative to the others?
- 2) How did the sub-projects' outcomes contribute to the overall project outcomes?
- 3) Was the training and technical assistance provided by the sub-project relevant to both the men and women beneficiaries' needs?
- 4) How were men and women impacted socially and economically, perhaps in different ways, by the sub-project approaches and results?
- 5) As a result of the sub-project, have men and women smallholder farmers improved their access to markets and their overall resilience?
- 6) Has the sub-project helped improve environmental, social and trade standards along the value chain?
- 7) How sustainable are the results achieved by the sub-project?
- 8) What has been the impact of COVID 19 on the sub-projects' results and sustainability?

4 Role and support provided by DFATD and IFC

4.1 DFATD

² Please note that one of the three sub-projects is still active. Questions will therefore be adapted accordingly (i.e. "Are smallholders improving their access to markets" instead of "have improved their access to markets"; etc.)

The TA in charge of the evaluation will be responsible for the following:

- Acting as the main DFATD contact person for the Contractor;
- Reviewing, commenting on and approving all deliverables,
- Facilitating where possible access to documentation and people deemed of importance to the evaluation process;
- Ensuring that all deliverables meet the OECD/DAC Quality Standards, in collaboration with DFATD Diplomacy, Trade and Corporate Affairs Evaluation Division, and as required with sector and thematic specialists;
- Sharing deliverables with key stakeholders;
- Collecting stakeholders' comments on the draft report;
- Including the management response in the final Evaluation Report;
- Including verbatim stakeholders' comments (if applicable); and
- Disseminating the evaluation.

4.2 IFC

- Facilitate access to the sub-project partners and sites;
- Share sub-project information as relevant; and
- Review the draft evaluation report and provide feedback prior to its finalization.

5 Risks

Operational Risk - There is a risk that the COVID-19 pandemic will affect the Evaluation.

The evolving COVID 19 pandemic may affect the conduct of the evaluation (e.g. availability of key informants and ability to carry out data collection in the field, etc.). This risk is currently affecting other DFATD projects. Both country program analysts and the Canadian government are closely monitoring the evolution of the global COVID-19 pandemic. Mitigation measures will be adjusted as required. The program will consider reorienting activities where possible.

Response Measures

The Contractor must thoroughly assess these constraints through an Evaluability Assessment in order to inform the evaluation's feasibility as well as the methodological choices, which may require greater reliance on certain lines of evidence, minimized travel to the field, increased use of information and communication technologies (ITC), etc.

Note: the use of local expertise cannot be ethically justifiable to replace international expertise if both bear or create the same COVID-19 related risks (getting or propagating the virus). However, there may be circumstances where international expertise is barred from reaching a country or where local expertise is more appropriate to use local ITCs, etc. It is important to restate for all evaluations, regardless of the COVID-19 situation, that i) local expertise is always strongly encouraged, and ii) ethical norms always have to be maintained.

Based on the results of the Evaluability Assessment, the evaluation may be delayed, cancelled, or narrowed in scope.

6 Tasks

6.1 Contractor's Tasks

The Contractor's tasks will include, but are not limited to :

- Manage, administer and coordinate all aspects of the work, and coordinate the various resources required to implement the evaluation;
- Carry out the assignment in conformity with the "*OECD/DAC (2010) Quality Standards for Development Evaluation*"³ and as per the process outlined in section 10.
- Provide a team composed of the categories detailed at section 12;

³ <http://www.oecd.org/dac/evaluation/qualitystandardsfordevelopmentevaluation.htm>

- Undertake an Evaluability Assessment, as per section 8.2;
- Upon approval of the Evaluability Assessment by DFATD, develop a work plan as per section 9.1;
- Undertake the evaluation following the work plan approved by the Technical Authority (TA);
- Prepare and submit all deliverables for revision and approval by the TA;
- Report regularly on progress to the TA;
- Ensure the quality assurance of all deliverables;
- Ensure quality interpretation and translation services if/when necessary;
- Provide qualified professional resources;
- Identify, prepare ToRs, procure and manage a team of local resources with the requisite skills, subject to the TA's non-objection; and

Note : The Contractor will NOT share draft deliverables with stakeholders without DFATD's approval. This is required to ensure a robust quality assurance throughout the evaluation process.

7 Evaluation process and deliverables

All deliverables must be prepared in English and submitted to the TA. Only the executive summary of the final evaluation report and the evaluation brief must be written in both official languages.

Both the draft and final work plan, and the draft and final evaluation reports must be submitted in MS Word or a compatible software. PDF files are not acceptable. Only the final evaluation report is to be submitted in hard copy format. Presentations to be delivered verbally with slides (such as in Powerpoint) will be submitted in electronic format to the TA for review prior to delivery.

Upon the TA's request, the Contractor will submit documents used/created under the current mandate, e.g., questionnaires, focus groups protocols, interview notes, raw data, survey data, database(s).

The evaluation will be conducted in three phases as outlined below. The Contractor is only authorized to perform the work necessary to complete one phase of the evaluation at a time. At the end of each phase, deliverables will be reviewed by DFATD. During this period, the Contractor will not be authorized to provide any services directly related to a subsequent phase. Upon acceptance of the results of the review and assessment of the deliverables, the TA will provide the Contractor with approval to proceed to the subsequent phase.

8 Phase 1

8.1 Start-up Meeting

The Contractor must attend (in person or via a tele- or video-conference) a start-up meeting with:

1. the TA, and
2. a member of the Evaluation Services, Learning and Innovation Unit of the Diplomacy, Trade and Corporate Evaluation Division.

The purpose of this meeting is to ensure that the participants understand:

- (1) DFATD expectations with regards to the quality of evaluation deliverables;
- (2) quality assessment processes and timelines; and
- (3) the evaluation mandate.

The Contractor will provide the TA with any questions that they have at least one day prior to the start-up meeting.

8.2 Evaluability Assessment

The Contractor will:

1. Examine the following key factors:
 - existence (availability and accessibility) and quality of data (specifically including sex-disaggregated data) – including data constraints related to COVID-19; Of note, IFC has collected a large amount of quantitative data that would be made available to the evaluation Team, except when confidential

- the timing of the evaluation;
 - availability of key informants: a stakeholder mapping exercise must be completed
 - identification of whether key stakeholders want/resist having their development intervention evaluated (e.g., the level of resistance to the evaluation and the reasons why).
2. Review the logic of each sub-project to:
 - assess the immediate, intermediate and ultimate outcome statements and propose measures to address flaws for the purpose of conducting the evaluation in terms of:
 - is each outcome clearly and unambiguously worded, containing only one idea?
 - can each outcome be measured?
 - is each outcome realistic and achievable?
 - is each outcome located at the proper outcome level?
 - are the causal relationships between outcome levels logical?
 - reconstruct a theory of change for the 3 selected sub projects;
 - confirm a shared interpretation among key stakeholders of the development intervention's expected immediate and intermediate outcomes; and
 - validate indicators and targets to assess each outcome (NOT output) according to DFATD's RBM guide.⁴
 3. Review the evaluation questions. Evaluation questions can be withdrawn if they are impossible to answer, overly difficult or if there is a need to reduce the focus of the evaluation. Questions may be further elaborated, modified or added. All changes, additions or deletions of questions must be accompanied by a supporting argument/rationale.

Please note that the IFC team responsible for the Project and selected sub-projects are based in different countries including the U.S., South Africa, Kenya, Ethiopia and Côte d'Ivoire, so it will not be possible to meet them all in person. All team members, however, are available at least virtually to support the evaluation. IFC's preferred video conference or conference call app for such meetings is WebEx (TBC at the time of implementation). In respect to this mandate, IFC is willing to offer video conference facilities for the Contractors, as needed and when available, including at its offices in Ethiopia and Côte d'Ivoire.

IFC agrees to permit the external evaluators to talk to its clients without IFC staff being present, but it requests that the following conditions (in line with best practices and ethics in evaluation) be respected:

- IFC staff will need to be present at any introductions between the Contractor and a client – either in person (ideally) or virtually. No exchanges with IFC clients can take place without the client being introduced to the external evaluators through IFC;
 - Clients (as participants) would be informed of the scope and purpose of the study;
 - Clients will be informed that they may decline to provide any data or responses which divulge business-sensitive information or information that they hold in confidence with their own stakeholders (such as smallholder farmers);
 - If any business-sensitive information is required for the purposes of the evaluation, the evaluators would need to agree to sign a non-disclosure agreement (NDA) with clients, since no pre-existing NDAs exist between IFC and the external evaluators who are being contracted by DFATD.
4. Explain and note any factors that compromise the independence of the evaluation and address possible conflicts of interest openly and honestly.

8.2.1 Deliverables for Evaluability Assessment

Deliverable 1: Draft Evaluability Assessment Report

The evaluability assessment report must follow the instructions indicated in 8.2 above and the structure as set out in Annex 1.1

⁴https://www.international.gc.ca/world-monde/assets/pdfs/funding-financement/results_based_management-gestion_axee_resultats-guide-en.pdf

Prior to submission to the TA, the Contractor must ensure that the evaluability assessment report has undergone an internal quality control process through the Contractor's Quality Assurance System. If the quality of the evaluability assessment report is deemed satisfactory by DFATD (form and substance), it will be circulated to co-operation partners and other stakeholders as necessary for comments. In the event that the quality is unsatisfactory, the Contractor will be required to produce a new version of the evaluability assessment report.

Deliverable 2: Final Evaluability Assessment Report

The Contractor must address all the comments and make appropriate amendments to the evaluability assessment prior to submission to the TA for review and approval. For each and every comment, the Contractor must indicate in writing how they have responded ("trail of comments"), using the proposed format set out in Annex 1.3. The trail of comments document is to be submitted to the TA at the same time as the updated evaluability assessment.

The evaluability assessment will be considered final upon approval by the TA.

9 Phase 2

9.1 Work plan

The Contractor will prepare a work plan that will operationalize and direct the evaluation. The work plan will follow the outline provided in Annex 1.2. Once approved by the TA, the work plan will serve as the agreement between the parties on how the evaluation is to be carried out. It is important to note that the work plan completes, but does not contractually replace, the Statement of Work in the Contract. The work plan will be elaborated based on the information presented in this SoW to bring greater precision to the planning and design of the evaluation. It will be based on a preliminary review of project documentation, discussions with key stakeholders, literature review, etc.

The following paragraphs provide guidance on how to address some sections of the work plan. However, all sections and annexes indicated in the outline of the work plan provided in Annex 1.2 must be completed.

Following the evaluability assessment, the work plan may propose revisions to the evaluation questions.

The purpose, scope and evaluation questions are to be used by the Contractor to determine the most appropriate approach for the present evaluation. The methodology must be developed in line with the evaluation approach chosen and support the answering of evaluation questions using credible evidence.

The methodology section is the most important section of the work plan. This importance will be reflected in its size relative to the entire document. In that section, the Contractor must explain and justify the selection of the proposed evaluation approach and must also specify and justify the overall evaluation design.

To describe and explain the evaluation methodology and its application, the Contractor will detail the proposed techniques for both data collection and data analysis (note: specific details on techniques for gender-sensitive data must be provided). The rationale for choosing those techniques must be provided and potential limitations and shortcomings must be explained. The methodology must take into consideration any data collection limitations due to COVID 19, and propose alternative data collection methods, for example, through remote/virtual data collection and the use of local Contractors, where appropriate (e.g. ethical) and necessary.

In order to add robustness to this section, the Contractor is to include a stakeholder mapping and analysis of the stakeholders involved in this development intervention.

Given that data will be collected from various samples (people, locations, etc.), it is important that each sample be representative of its population. Thus, in the methodology section of the work plan, the Contractor will detail the characteristics of each sample: how it is selected, the rationale for the selection, and the limitations of the sample for interpreting evaluation results. If a sample is not used, the rationale for not sampling and the implications for the evaluation will be provided.

Where data is collected during the evaluation stakeholder consultation process, the Contractor will explain how the information collected will be organized, classified, tabulated, inter-related, compared and displayed relative to the evaluation questions, including what will be done to integrate multiple sources.

The Contractor must set-up and maintain an Evaluation Evidence Matrix (EEM) (see Annex 1.5) to ensure that the collection and recording of data and information is done systematically. This matrix will help the Contractor consolidate in a structured manner all collected information corresponding to each evaluation question and to identify data gaps and collect outstanding information before the end of the data collection phase. The EEM will play important but slightly varying roles throughout all stages of the evaluation process and therefore will require particular attention from the Contractor. Owing to the changing role and function of the EEM over the course of the evaluation, the matrix will need to serve as a series of working tools throughout the evaluation process. It is essential that the final (published) version of the EEM be structured and drafted in a manner that facilitates the easy access of evaluation users to the evidence that support the answer of each evaluation question.

The Contractor attaches the following annexes to the work plan:

- Evaluation Evidence Matrix (EEM).
- Sampling. For each sample the following must be defined and explained in detail: the purpose, objectives, universe/population, sampling criteria, sample design, sampling frame, sampling unit, sample size, sampling method(s), proposed sample and limitations.
- Proposed draft data collection tools (interviews, focus groups or other participatory methods, protocols, tabulations, etc.).

Deliverable 3: Draft Work Plan

The draft work plan must follow the instructions indicated in section 9.1 above and the structure as set out in Annex 1.2. Prior to submission to the TA, the Contractor must ensure that the draft work plan has undergone an internal quality control process through the Contractor's Evaluation Quality Assurance System (EQAS). If the quality of the draft work plan is deemed satisfactory by DFATD (form and substance), the draft work plan will be circulated to Co-operation partners and other stakeholders as necessary for comments. In the event that the quality is unsatisfactory, the Contractor will be required to produce a new version of the draft work plan.

Deliverable 4: Final Work Plan

The Contractor must address all the comments and make appropriate amendments to the work plan prior to submission to the TA for review and approval. For each and every comment, the Contractor indicates in writing how they have responded ("trail of comments"), using the proposed format set out in Annex 1.3. The trail of comments document is to be submitted to the TA at the same time as the updated work plan.

The work plan will be considered final upon approval by the TA.

10 Phase 3

10.1 Data Collection Phase

Data collection will be undertaken according to the TA-approved work plan.

Pending the evaluability assessment report and the approved work plan, the field mission is expected to be no less than 30 days in duration, with proportionately more time spent in Ivory Coast as the Contractor will be assessing two sub-projects there, as opposed to one sub-project in Ethiopia. Based on the Evaluability Assessment these countries may change. Although the TA for the project is usually based in Kenya, in the context of the pandemic, she could be repatriated to Canada for an unknown time period along with her other Pan African Team colleagues usually based in Ivory Coast and Ethiopia. If the Pan Africa Team members are in their respective host countries at the time of the evaluation, the DFATD Pan Africa and Regional Development Program field officers in the two target countries are to be briefed by the Contractor on arrival. In case of their absence, another colleague based at the embassy may be named to meet with the evaluation team.

Deliverable 5: In-country Debrief Sessions

The Contractor presents preliminary data to in-country key stakeholders and DFATD staff (in country and via tele- or video-conference) for discussions two days prior to departure from the field. Note: In-country debrief is needed to review data with selected key stakeholders, increase the Contractor's understanding of data cumulated so far, and identify data issues or gaps that may be addressed/collected/ revisited before leaving the country. The in-country debrief is not to be used to present preliminary findings as the data analysis is not yet completed and could mislead stakeholders.

Presentation material is to be submitted to the TA prior to the debriefing session. Minutes and any supplementary material provided during the session are to be submitted one week after the session.

While these debriefs are proposed to be conducted in Abidjan and Addis Ababa, as noted in Section 2.3, the countries may change based on the COVID 19 situation.

10.2 Reporting

Deliverable 6: Post-Data Collection Debriefing Session

The Contractor's Team Leader conducts a debriefing session to be held at a location mutually agreed upon with the TA – likely the closest Canadian embassy to the Contractor's offices or at DFATD HQ in Ottawa and/or via tele- or video-conference after finalizing the data collection phase. The presentation is to include preliminary findings responding to the evaluation questions.

Presentation material is to be submitted to the TA at least five working days prior to the session. Minutes and any supplementary material provided during the session are to be submitted one week after the session.

Deliverable 7: Draft Evaluation Report

The draft evaluation report must conform to the *OECD/DAC (2010) Quality Standards for Development Evaluation* and follow the structure and instructions as set out in Annex 1.4, including an executive summary (following the outline provided in Annexe 1.6) and all relevant annexes.

Prior to submission to the TA, the Contractor must ensure that the draft evaluation report has undergone an internal quality control process through the Contractor's Evaluation Quality Assurance System (EQAS). If the quality of the draft evaluation report is deemed satisfactory by DFATD (form and substance), the draft evaluation report will be circulated to IFC and other stakeholders as necessary for comments. In the event that the quality is unsatisfactory, the Contractor will be required to produce a new version of the draft evaluation report.

The TA is responsible for sharing the draft report and collecting stakeholder comments. ***The Contractor will not submit the draft evaluation report to stakeholders without the TA's approval.***

Deliverable 8: Final Evaluation Report

The Contractor must address all the comments and make appropriate amendments to the evaluation report prior to submission to the TA for review and approval.

For each and every comment, the Contractor indicates in writing how they have responded ("trail of comments"), using the format set out in Annex 1.3. The trail-of-comments document is to be submitted to the TA at the same time as the updated evaluation report.

Note: As per the *OECD/DAC (2010) Quality Standards for Development Evaluation*, "Relevant stakeholders are given the opportunity to comment on the draft report. The final evaluation report reflects these comments and acknowledges any substantive disagreements. In disputes about facts that can be verified, the evaluators investigate and change the draft where necessary. In the case of opinion or interpretation, stakeholders' comments are reproduced verbatim, in an annex or footnote, to the extent that this does not conflict with the rights and welfare of participants."

The evaluation report will be considered final upon approval by the TA.

Deliverable 9: Evaluation Brief

The evaluation brief consists of a short paper (approximately 2 pages) with infographics documenting the process of the evaluation and presenting the main results. It is to be based upon the final evaluation report and is different and separate from the executive summary included in the evaluation report. The evaluation brief is to be provided in both of Canada's official languages: English and French. Translation in French as well as copy-editing of the French version of the brief is the responsibility of the Contractor.

Deliverable 10: Final Report Presentation

The Contractor prepares and conducts a "Brown Bag Lunch" to present the findings, conclusions, recommendations and lessons of the evaluation in a location mutually agreed upon with the TA – likely the closest Canadian embassy to the Contractor's offices or at DFATD HQ in Ottawa and/or via tele- or video-conference, at a time to be agreed upon with the TA.

11 Management response and dissemination

The Contractor is not responsible for these activities. This is provided for information purposes only.

11.1 Management Response

Both DFATD and IFC will prepare a management response to the evaluation report that documents their response to the recommendations and establishes how each organization will (or will not) follow-up on the recommendations.

11.2 Dissemination

The DFATD Branch responsible for the current evaluation is also responsible for the dissemination of the report and for ensuring that the executive summary is made public as per Canada's commitment to the International Aid Transparency Initiative.

12 Contractor Profile

The Contractor must provide a Core Evaluation Team and Local Specialists. That is, the Contractor must engage a local resource in both Ethiopia and Côte d'Ivoire to plan and organize evaluation-related field work (refer to 12.2)

12.1 Core Evaluation Team

The Core Evaluation Team must include an Evaluation Team Leader (ETL). It may also include other subject matter experts.

The individuals proposed for specific areas of expertise must have experience providing technical services in that area of expertise in the context of international development interventions. The ETL or the Local Specialists (refer to 12.2) may cover any of the required technical expertise in:

- agri-business, value chains and business development services
- gender equality
- quantitative and qualitative data analysis

The Team may also be complemented by additional specialized and non-specialized personnel as necessary.

Note that the ETL will determine the final allocation of tasks across team members based on the requirements set out in the work plan

12.2 Local Coordinators-Specialists

Reporting to the Core Evaluation Team, each country (Côte d'Ivoire and Ethiopia) must have an assigned Local Coordinator-Specialist. These local specialists will help plan and organize evaluation-related field work and will be responsible to provide local logistics, translation, contextual knowledge of the agribusiness sector, and cultural interpretation. They may be identified after the awarding of the contract. The proposed specialists must have experience conducting primary data collection in the country for which they are being proposed, with a working knowledge of the local language, culture and laws, and an understanding of agriculture and/or SMEs in the host country. In Ethiopia, the resource is expected to be fluent in Amharic and in Côte d'Ivoire, in French.

NOTE: A member of the Core Evaluation Team may play the role of Local Coordinators-Specialist.

12.3 Additional Specialized Personnel as necessary

The Core Evaluation Team may choose to source or engage, competitively or otherwise, additional local evaluators and/or specialized technical experts, as necessary. The Contractor will be responsible for the identification, procurement and management of these technical experts.

12.4 Additional Non-Specialized Personnel as necessary

The Core Evaluation Team may draw upon other non-specialized staff, as necessary. These resources may include, but are not limited to, local mission coordinators, researchers, editorial and communications staff, administrative and logistical assistance personnel, translators/interpreters, and, enumeration personnel. The Contractor will be responsible for the identification, procurement and management of these non-specialized experts

13 Location of work

The data collection will be performed at various locations in Côte d'Ivoire and Ethiopia. The specific locations will be proposed by the Contractor in the work plan and be approved by the Technical Authority.

Should conditions preclude travel to Côte d'Ivoire and/or Ethiopia the Contractor will work with DFATD to identify opportunities and modalities for undertaking activities virtually, if possible.

A portion of the work will also be done at the Contractor's office.

14 Travel

The Contractor will be required to participate in an inception meeting in Ottawa, Ontario via teleconference, videoconference, or in person, and to travel to two countries (refer to 2.3) – as per the DFATD approved Inception Report – for the field-based case studies.

IMPORTANT NOTE:

Subject to section 5 RISK, the Contractor is expected to travel to two countries for field-based case studies as described in section 2.3. The selection of the field-based case study countries will be reviewed during the inception period in light of the evolving COVID 19 pandemic. The TA reserves the right to modify the selection of the stated field-based case study countries. In addition, the Contractor is expected to travel to Ottawa, Ontario OR, depending on the evolving COVID 19 pandemic, this work may be done through tele/videoconference during the inception phase and again during the reporting phase for the final presentation. Dates and times for the inception meeting will be confirmed during Contract negotiation and should take place within two weeks of contract signature.

IMPORTANT NOTE: All travel required for this evaluation is subject to the COVID-19 regulations and recommendations of the Government of Canada and the Governments of the two countries selected for three field-based case studies.

15 Language level

The working language for this evaluation mandate is English.

15.1 Evaluation Team Leader

The Evaluation Team Leader must possess at least the following language proficiencies **in English and in French**

In English

Advanced Reading Proficiency:

Ability to understand texts dealing with a wide variety of work-related topics; ability to understand most complex details, interferences and fine points of meanings; ability to read with good comprehension specialized or less familiar material.

Advanced Oral Interaction Proficiency:

Ability to give detailed explanations and descriptions; ability to handle hypothetical questions; ability to support an opinion, defend a point of view, or justify an action; ability to counsel and give advice; ability to handle complex work-related situations.

Advanced Writing Proficiency:

Ability to write explanations or descriptions in a variety of informal and formal work-related situations; ability to write texts in which the ideas are developed and presented in which vocabulary, grammar and spelling are generally appropriate and require few corrections.

In French

Intermediate Reading Proficiency:

Ability to grasp the main idea of most work-related texts; ability to identify specific details; and ability to distinguish main from subsidiary ideas.

Intermediate Oral Interaction Proficiency:

Ability to sustain a conversation on concrete topics, give straightforward instruction and provide factual description and explanations; ability to report on actions taken; ability to understand and express hypothetical and conditional ideas.

Intermediate Writing Proficiency:

Ability to write short descriptive or factual texts; ability to deal with explicit information on work-related topics since they have sufficient mastery of grammar and vocabulary; ability to communicate the basic information, but the text will require some corrections in grammar and vocabulary as well as revision for style.

15.2 Team members

At least one member will have Advanced Professional Proficiency in French

Advanced Reading Proficiency:

Ability to understand texts dealing with a wide variety of work-related topics; ability to understand most complex details, interferences and fine points of meanings; ability to read with good comprehension specialized or less familiar material.

Advanced Oral Interaction Proficiency:

Ability to give detailed explanations and descriptions; ability to handle hypothetical questions; ability to support an opinion, defend a point of view, or justify an action; ability to counsel and give advice; ability to handle complex work-related situations.

Advanced Writing Proficiency:

Ability to write explanations or descriptions in a variety of informal and formal work-related situations; ability to write texts in which the ideas are developed and presented in which vocabulary, grammar and spelling are generally appropriate and require few corrections.

All members will have at least Intermediate Proficiency in English

Intermediate Reading Proficiency:

Ability to grasp the main idea of most work-related texts; ability to identify specific details; and ability to distinguish main from subsidiary ideas.

Intermediate Oral Interaction Proficiency:

Ability to sustain a conversation on concrete topics, give straightforward instruction and provide factual description and explanations; ability to report on actions taken; ability to understand and express hypothetical and conditional ideas.

Intermediate Writing Proficiency:

Ability to write short descriptive or factual texts; ability to deal with explicit information on work-related topics since they have sufficient mastery of grammar and vocabulary; ability to communicate the basic information, but the text will require some corrections in grammar and vocabulary as well as revision for style.

At least **one member** fluent in **Amharic**. At least **one member** verbally fluent in the **local language** of the key beneficiaries of the 3 sub-projects. If not, an interpreter will be contracted;

16 Quality Assurance

Quality of evaluation deliverables

The first level of quality assurance for evaluation deliverables will be conducted by the Contractor. That is, the Contractor must systematically quality control all deliverables prior to submission to the TA.

The second level of quality assurance for evaluation deliverables will be conducted by DFATD. Deliverables will be reviewed by: i) DFATD Program staff, ii) DFATD Diplomacy, Trade and Corporate Affairs Evaluation Division staff, and iii) DFATD specialists. As part of DFATD's decentralized EQAS, a Quality Assurance Report (QAR) will be applied in the assessment of deliverables for this evaluation. The QAR uses evaluation quality standards that follow primarily the OECD/DAC *Quality Standards for Development Evaluation*, but also the United Nations Evaluation Group *UNEG Norms and Standards for Evaluation* and best practices from the international evaluation community. To further enhance the quality and credibility of this evaluation, DFATD-identified stakeholders will also comment on the deliverables (factual checks).

17 Deliverables and indicative time schedule

This evaluation, including the field mission, is expected to be carried out within 12 months of contract signature.

	Deliverable	Indicative Time Schedule
Phase One		
	Start-up Meeting	Within 2 weeks of contract signature
1	Draft Evaluability Assessment Report	3 weeks after Start-up Meeting
2	Final Evaluability Assessment Report	2 weeks after reception of comments on the draft evaluability report from the TA
Phase Two		
3	Draft Work Plan	2 weeks after approval of Evaluability Assessment Report
4	Final Work Plan	1 week after reception of comments from the TA on draft work plan
Phase Three		
Data Collection		
5	In-country Debrief Sessions (2)	Within 2 days of the end of each country mission
Reporting		
6	Post-data Collection Debriefing Session	2 weeks after last country mission
7	Draft Evaluation Report with Executive Summary	3 weeks after post-data collection debriefing session
8	Final Evaluation Report with Bilingual Executive Summary	2 weeks after Recommendation Workshop (or after reception of comments from the TA on draft evaluation report)
9	Bilingual Evaluation Brief	2 weeks after final evaluation report approval
10	Final report presentation	Within 1 month after the approval of the Final Evaluation Report

Annex 1.1: Outline of Evaluability Assessment Report

Outline of the Evaluability Assessment Report

Table of Contents

List of Acronyms

List of Tables (*)

List of Figures

1 Introduction

Must include: rationale, purpose and specific objectives of the evaluation.

2 Development Context

Must include: a *brief* description of key contextual elements, specific to the development Intervention. A more exhaustive context is expected in the work plan deliverable.

3 Evaluation Object

Must include: a brief description of the development Intervention (e.g. the time period; budget; geographical area; programming; stakeholder mapping; organizational set-up; implementation arrangements).

4 Methodology

Must include: a description and an explanation of the evaluability assessment methodology (details of techniques for data collection and data analysis, and justification for, methodological choices) and its application (*details of what was done along with limitations and shortcomings*). The report acknowledges any constraints encountered and how these have affected the evaluability assessment, including the independence and impartiality of the evaluability assessment.

5 Main findings and analysis

Must include:

- Documented and analyzed key factors as per section 5.2;
- Documented review of the logic of the intervention as per section 5.2;
- Documented (provide supporting argument/rationale) updates for all changes, additions or deletions of questions as per section 5.2;
- Documented explanation regarding any factors that may compromise the independence of the evaluation;
- Documented and addressed possible conflicts of interest openly and honestly.

It is suggested that the findings and analysis be presented as follow:

Finding # – Finding Statement [*Findings are numbered successively to ease cross-references. The length of a finding statement is maximum 1 to 2 lines in bold character*]

1st Paragraph: *Explanation detailing the finding statement.*

Following Paragraph(s): *present the analysis of the data/info on which the finding is based. It provides sufficient detail on the sources of data/information so that the adequacy of the information can be assessed.*

Following Paragraph: *present data gaps where the findings cannot be fully triangulated and/or discuss the validity and reliability of the data, as well as any weaknesses in the analysis used to support the finding.*

6 Evaluation Options

Must include: Documented options for the conduct of the evaluation (cancel or delay or adjust/modify reduce scope or repurpose).

Options must be clear, relevant, targeted and actionable so that the evaluation can be used to meet the needs of the intended users. Options must flow logically from the findings. Options are presented as follows:

Option# – Option Statement. *The length of an option statement is maximum 1 to 2 lines in bold character]*

Following paragraph: *Explain the option in more detail*

Annexes

Must include:

- SoW (and amendments if applicable)
- Stakeholder Mapping
- Explanation of sampling and samples (if applicable)
- Methodological instruments used (survey, focus groups, interviews etc.)
- Bibliography
- List of people interviewed
- Additional information on context, program or methodology and analysis as necessary.

() Tables, Graphs, diagrams, maps etc. presented in the final evaluability assessment report are also to be provided to the TA in their original version (in Excel, PowerPoint or word files, etc.).*

Annex 1.2: Outline of the Evaluation Work Plan

Table of Contents
List of Acronyms
List of Tables (*)
List of Figures (*)

1. Rationale, Purpose and Specific Objectives of the Evaluation

Must include: rationale, purpose and specific objectives of the evaluation.

2. Development Context

Must include: a description of key contextual element, specific to the development intervention.

3. Evaluation Object and Scope

Must include: a brief description of the development intervention (e.g. the time period; budget; geographical area; programming; intervention logic, stakeholder mapping; organizational set-up; implementation arrangements)

4. Evaluation Questions

Must include: a set of revised evaluation questions with the explanatory associated comments.

5. Evaluation Approach and Methodology

Must include: (i) a description and an explanation of the evaluation approaches, evaluation methodology and its application; including details of, and justification for, the methodological choices; (ii) description of the methods of data collection (desk and field-based) -- including data collection plan; preparation of interview and guides for focus groups; surveys; etc. (iii) description of samples, sampling choices/methods and limitations regarding the representativeness of samples for interpreting evaluation results. (iv); data analysis plan (i.e. how the information collected will be organized, classified, tabulated, inter-related, compared and displayed relative to the evaluation questions, etc.); (v) limitations.

6. Reporting

Must include: an explanation of the debriefing sessions.

7. Evaluation Management

Must include: team composition and distribution of tasks, roles and responsibilities; the Contractor's approach to ensure quality assurance of all evaluation deliverables.

8. Deliverables, Milestones, Schedule, Level of Effort and Budget

Must include: a detailed plan for the next phases/stages of the evaluation; including detailed plans for field visits, including the list of interventions for in-depth analysis in the field (explanation of the value added for the visits), preparation process and logistics, recruitment of field teams, etc.

9. Annexes

Must include:

- Logic Model and PMF
- SoW (and amendments if applicable)
- Stakeholder Mapping and Analysis
- Evaluation Evidence Matrix
- Explanation of Sampling and Proposed Samples
- List of Documents Consulted for the Work Plan
- List of Individuals Consulted for the Work Plan (Disaggregated by Affiliation and Sex)
- Proposed Data Collection Tools / Protocols
- Proposed Field Work Schedule

(*) Tables, figures, graphs and diagrams will be numbered and have a title.

Annex 1.3: Evaluation Trail-of-Comments Template

DFATD QAR Comment	Page #	Contractor's Response
1. [Please insert DFATD's comments as stated in the QAR]	[p.XX]	[Please explain what modifications were made and why or provide a justification for rejecting the comment]
2.		
3.		
5.		
6.		
7.		

Annex 1.4: Outline of the Evaluation Report

Table of Contents
List of Acronyms
List of Tables (*)
List of Figures

Executive Summary

1 Introduction

Must include: rationale, purpose and specific objectives of the evaluation;

2 Development Context

Must include: a description of key contextual element, specific to the development Intervention;

3 Evaluation Object

Must include: a brief description of the development Intervention (e.g. the time period; budget; geographical area; programming; stakeholder mapping; organisational set-up; implementation arrangements);

4 Methodology

Note: This is a standalone document. Information included in the work plan may be used (synthesized, copied and updated as needed) in this section while never referencing to the work plan report. This section can be complemented in an annex.

Must include: a description and an explanation of the evaluation approaches and methodology (*details of 5*, and justification for, methodological choices) and its application (*details of what was done along with limitations and shortcomings*). The report acknowledges any constraints encountered and how these have affected the evaluation, including the independence and impartiality of the evaluation.

5 Main findings and analysis

This section is divided by evaluation questions. Under each evaluation question, key finding(s) are presented as follow:

Finding # – Finding Statement [*Findings are numbered successively to ease cross-references. The length of a finding statement is of 1 to maximum 2 lines in bold character*]

1st Paragraph: *Explanation detailing the finding statement*

Following Paragraph(s): *present the analysis of the data/info on which the finding is based. It provides sufficient detail on the sources of data/info so that the adequacy of the information can be assessed. The text is structurally presented in a way that eases cross-referencing to the Evaluation Evidence Matrix located in the annex while never referencing to the annex. i.e. a reader can read the text without the need to access the annex.*⁶

Following Paragraph: *present data gaps where the findings cannot be fully triangulated and/or discuss the validity and reliability of the data, as well as any weaknesses in the analysis used to support the finding.*

6 Conclusions

Must include: at least one conclusion for each evaluation issue. Additional conclusions may encompass more than one issue. Conclusions are presented as follow:

Conclusion # – Conclusions Statement [*Conclusions are numbered successively to ease cross-references. The length of a conclusion statement is of 1 to maximum 2 lines in bold character*]

⁵“*Details of*” pertain to: techniques for data collection (including sampling choices/methods, samples and limitations regarding their representativeness for interpreting evaluation results) and data analysis.

⁶ See description the *Evaluation Evidence Matrix* in annex 1.5.

1st Paragraphs: 1) Explain the conclusion in more detail and 2) State the specific findings # to which the conclusion pertains.

Following paragraph: present the analysis of the findings on which the conclusion is based (i.e. critically analyzes the findings which led to the conclusions and ensures a clear link between the conclusions and the recommendations).

7 Recommendations

Recommendations are clear, relevant, targeted and actionable so that the evaluation can be used to achieve its intended purpose(s), thus meeting the needs of the intended users. Recommendations must flow logically from the conclusions. The number of recommendations will be limited to a maximum of five. Recommendations are presented as follow:

Must include for each recommendation:

Recommendation # – Recommendation Statement [Recommendations are numbered successively and ranked (prioritized) according to their relevance and importance to the evaluation purpose. The length of a recommendation statement is of 1 to maximum 2 lines in bold character];

Targeted party: [body targeted by the recommendation]

Link to Conclusion: [e.g. #X and #Y]

Following paragraph: 1) Explain the recommendation in more detail and 2) State the specific conclusion # to which the recommendation pertains.

Annexes

Must include:

- SoW (and amendments if applicable)
- Stakeholder Mapping
- Evaluation Evidence Matrix duly completed
- Explanation of Sampling and Samples
- Methodological instruments used (survey, focus groups, interviews etc.)
- Bibliography
- List of people interviewed
- Additional information on context, program or methodology and analysis as necessary.

(*) Tables, Graphs, diagrams, maps etc. presented in the final evaluation report are also to be provided to the TA in their original version (in Excel, PowerPoint or word files, etc.).

Annex 1.5: Structure of the Evaluation Evidence Matrix

The table below represents the structure for the evaluation evidence matrix (EEM) in which each evaluation question must be included.

This matrix must become the starting point for subsequent versions of the EEM that the Contractor must use to compile and organize data and information throughout the evaluation process.

The EEM serves as a working tool throughout the evaluation process and will specifically be useful during the:

- **design of the evaluation (i.e., the inception phase)**, the EEM is to be used to capture core aspects of the evaluation design: (a) what is to be evaluated (i.e. key investigation areas, evaluation questions and related issues to be examined); (b) how to evaluate (sources of information and methods and tools for data collection). In this way, the matrix is to also help the Contractor and DFATD to check the feasibility of evaluation questions and the associated data collection strategies.
- **data collection phase of the evaluation**, the EEM helps the Contractor to: (a) approach the collection of information in a systematic, structured way; (b) identify possible gaps in the evidence base of the evaluation; and (c) compile and organize the data to prepare and facilitate the systematic analysis of all collected information.
- **analysis and reporting phase**, the EEM helps the Contractor to conduct the analysis in a systematic and transparent way, by showing clear association between the evidence collected and the findings and conclusions derived on the basis of this evidence.
- **dissemination phase**, and the actual use of the evaluation, the EEM plays a key role for making sure that users of the report can understand how the Contractor's team interpreted the available evidence to arrive at their findings, so that they are considered credible and valid.

Outline for evaluation evidence matrix

Evaluation Question 1	<i>[Text of Evaluation Question]</i>		
Rationale	<i>[Summary of how the sub-questions will be used to answer the main evaluation question]</i>		
Sub-Question 1.1	<i>[Text of Sub-question 1.1]</i>		
Data / Indicators	Sources of information	Methods and tools for data collection	Notes
1. Indicator or Data 1.1.1 2. Indicator or Data 1.1.2 Etc.			(e.g. representativeness of the sample when applicable)
Sub-Question 1.2			
3. Etc.			

Annex 1.6: Outline of the Executive Summary with instructions

(MAXIMUM OF 6 PAGES)

Evaluation Title: Insert the complete name of the evaluation

Evaluation Type: Formative, summative, prospective, thematic, etc.

Commissioned by: The Department's Program Branch (in the case of Joint evaluation; list agencies involved)

Contractor: Name of the firm/individual contracted to conduct the evaluation

Date: Month and year submitted

Rationale and Purpose of the Evaluation

As per the SoW.

Specific Objectives of the Evaluation

As per the SoW.

Scope of the Evaluation

As per the SoW.

Development Context

Description of the context in which the intervention was implemented, including key local government policies and strategies and socio-economic, political and cultural factors of relevance for the intervention.

Intervention

Description of the intervention being evaluated, including: ultimate outcome, start and end dates, budget, geographical area covered, main components, and crosscutting issues addressed (i.e. gender equality, environmental sustainability and governance).

Intervention Logic

List the ultimate, intermediate and immediate outcomes as per the Logic Model (LM).

Stakeholders

As per the SoW.

Evaluation Approach and Methodology

Description of the (1) Evaluation approach, (2) Methodology, (3) Techniques for data collection and analysis, (4) Sampling, and (5) Limitations of the evaluation.

Key Findings*

Select and list key findings.

Key Conclusions*

Select and list key conclusions.

Key Recommendations*

Select and list key recommendations.

Key Lessons

Select and list key lessons.

*The findings, conclusions, recommendations and lessons listed above are those of the Contractor and do not necessarily reflect the views of the Department or the Government of Canada. The Department does not guarantee the accuracy of the information provided in this report.

Management Responses

Department's response: *The program may wish to publish management responses where it is targeted by a recommendation. Otherwise, a generic response can be provided e.g. The Department took note of the Contractor's findings, conclusions and recommendations and has shared them with relevant stakeholders for consideration.*

Cooperation Partner(s) response(s): *Partners may wish to provide management responses where they are targeted by a recommendation. Otherwise, a generic response can be provided e.g. The partner(s) took note of the Contractor's findings, conclusions and recommendations and has(have) shared them within the organization(s) for consideration.*

Language: *This report is only available in (language). If you would like a copy, please contact info@international.gc.ca*

ANNEX B – BASIS OF PAYMENT**Table 1 Schedule of Milestones**

The schedule of milestones for which payments will be made in accordance with the Contract is as follows:

	Deliverable	Firm Price, %	Value in Canadian dollars, \$CAD
Work Plan Phase			
	Start-up Meeting	5	
1	Draft Evaluability Assessment Report	5	
2	Final Evaluability Assessment Report	5	
3	Draft Work Plan	10	
4	Final Work Plan	10	
Data Collection Phase			
5	In-country Debrief Sessions (2)	10	
Reporting Phase			
6	Post-data Collection Debriefing Session	10	
7	Draft Evaluation Report with Executive Summary	10	
8	Final Evaluation Report with Bilingual Executive Summary	20	
9	Bilingual Evaluation Brief	5	
Dissemination Phase			
10	Dissemination presentation	10	
	Applicable taxes		
	Contract total		

ANNEX C – SECURITY REQUIREMENTS CHECK LIST



Contract Number / Numéro du contrat not yet assigned
Security Classification / Classification de sécurité Unclassified

**SECURITY REQUIREMENTS CHECK LIST (SRCL)
LISTE DE VÉRIFICATION DES EXIGENCES RELATIVES À LA SÉCURITÉ (LVERS)**

PART A – CONTRACT INFORMATION / PARTIE A – INFORMATION CONTRACTUELLE		
1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine Global Affairs Canada	2. Branch or Directorate / Direction générale ou Direction WGM	
3. a) Subcontract Number / Numéro du contrat de sous-traitance RFP	3. b) Name and Address of Subcontractor / Nom et adresse du sous-traitant not yet named	
4. Brief Description of Work / Brève description du travail An Evaluation Team will be assessing three sub-projects of IFC's Enhancing Farmers' Access to Markets in Africa project in two countries - most likely, Côte d'Ivoire and Ethiopia.		
5. a) Will the supplier require access to Controlled Goods? Le fournisseur aura-t-il accès à des marchandises contrôlées?	<input checked="" type="checkbox"/> No / Non	<input type="checkbox"/> Yes / Oui
5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations? Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques?	<input checked="" type="checkbox"/> No / Non	<input type="checkbox"/> Yes / Oui
6. Indicate the type of access required / Indiquer le type d'accès requis		
6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS? (Specify the level of access using the chart in Question 7. c) (Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c)	<input checked="" type="checkbox"/> No / Non	<input type="checkbox"/> Yes / Oui
6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted. Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé.	<input checked="" type="checkbox"/> No / Non	<input type="checkbox"/> Yes / Oui
6. c) Is this a commercial courier or delivery requirement with no overnight storage? S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit?	<input checked="" type="checkbox"/> No / Non	<input type="checkbox"/> Yes / Oui
7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès		
Canada <input checked="" type="checkbox"/>	NATO / OTAN <input type="checkbox"/>	Foreign / Étranger <input checked="" type="checkbox"/>
7. b) Release restrictions / Restrictions relatives à la diffusion		
No release restrictions / Aucune restriction relative à la diffusion <input checked="" type="checkbox"/>	All NATO countries / Tous les pays de l'OTAN <input type="checkbox"/>	No release restrictions / Aucune restriction relative à la diffusion <input checked="" type="checkbox"/>
Not releasable / À ne pas diffuser <input type="checkbox"/>		
Restricted to: / Limité à: <input type="checkbox"/>	Restricted to: / Limité à: <input type="checkbox"/>	Restricted to: / Limité à: <input type="checkbox"/>
Specify country(ies): / Préciser le(s) pays:	Specify country(ies): / Préciser le(s) pays:	Specify country(ies): / Préciser le(s) pays: Ethiopia, Côte d'Ivoire
7. c) Level of information / Niveau d'information		
PROTECTED A / PROTÉGÉ A <input type="checkbox"/>	NATO UNCLASSIFIED / NATO NON CLASSIFIÉ <input type="checkbox"/>	PROTECTED A / PROTÉGÉ A <input type="checkbox"/>
PROTECTED B / PROTÉGÉ B <input type="checkbox"/>	NATO RESTRICTED / NATO DIFFUSION RESTREINTE <input type="checkbox"/>	PROTECTED B / PROTÉGÉ B <input type="checkbox"/>
PROTECTED C / PROTÉGÉ C <input type="checkbox"/>	NATO CONFIDENTIAL / NATO CONFIDENTIEL <input type="checkbox"/>	PROTECTED C / PROTÉGÉ C <input type="checkbox"/>
CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>	NATO SECRET / NATO SECRET <input type="checkbox"/>	CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>
SECRET / SECRET <input type="checkbox"/>	COSMIC TOP SECRET / COSMIC TRÈS SECRET <input type="checkbox"/>	SECRET / SECRET <input type="checkbox"/>
TOP SECRET / TRÈS SECRET <input type="checkbox"/>		TOP SECRET / TRÈS SECRET <input type="checkbox"/>
TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>		TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité
Unclassified





Contract Number / Numéro du contrat not yet assigned
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**SECURITY REQUIREMENTS CHECK LIST (SRCL)
LISTE DE VÉRIFICATION DES EXIGENCES RELATIVES À LA SÉCURITÉ (LVERS)**

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4. Brief Description of Work / Brève description du travail An Evaluation Team will be assessing three sub-projects of IFC's Enhancing Farmers' Access to Markets in Africa project in two countries - most likely, Côte d'Ivoire and Ethiopia.		
5. a) Will the supplier require access to Controlled Goods? Le fournisseur aura-t-il accès à des marchandises contrôlées?		<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui
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6. c) Is this a commercial courier or delivery requirement with no overnight storage? S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit?		<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui
7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès		
Canada <input checked="" type="checkbox"/>	NATO / OTAN <input type="checkbox"/>	Foreign / Étranger <input checked="" type="checkbox"/>
7. b) Release restrictions / Restrictions relatives à la diffusion		
No release restrictions / Aucune restriction relative à la diffusion <input checked="" type="checkbox"/>	All NATO countries / Tous les pays de l'OTAN <input type="checkbox"/>	No release restrictions / Aucune restriction relative à la diffusion <input checked="" type="checkbox"/>
Not releasable / À ne pas diffuser <input type="checkbox"/>		
Restricted to: / Limité à: <input type="checkbox"/>	Restricted to: / Limité à: <input type="checkbox"/>	Restricted to: / Limité à: <input type="checkbox"/>
Specify country(ies): / Préciser le(s) pays:	Specify country(ies): / Préciser le(s) pays:	Specify country(ies): / Préciser le(s) pays: Ethiopia, Côte d'Ivoire
7. c) Level of information / Niveau d'information		
PROTECTED A / PROTÉGÉ A <input type="checkbox"/>	NATO UNCLASSIFIED / NATO NON CLASSIFIÉ <input type="checkbox"/>	PROTECTED A / PROTÉGÉ A <input type="checkbox"/>
PROTECTED B / PROTÉGÉ B <input type="checkbox"/>	NATO RESTRICTED / NATO DIFFUSION RESTREINTE <input type="checkbox"/>	PROTECTED B / PROTÉGÉ B <input type="checkbox"/>
PROTECTED C / PROTÉGÉ C <input type="checkbox"/>	NATO CONFIDENTIAL / NATO CONFIDENTIEL <input type="checkbox"/>	PROTECTED C / PROTÉGÉ C <input type="checkbox"/>
CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>	NATO SECRET / NATO SECRET <input type="checkbox"/>	CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>
SECRET / SECRET <input type="checkbox"/>	COSMIC TOP SECRET / COSMIC TRÈS SECRET <input type="checkbox"/>	SECRET / SECRET <input type="checkbox"/>
TOP SECRET / TRÈS SECRET <input type="checkbox"/>		TOP SECRET / TRÈS SECRET <input type="checkbox"/>
TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>		TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>

TBS/SCT 350-103(2004/12)

Security Classification / Classification de sécurité Unclassified
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Government of Canada / Gouvernement du Canada

Contract Number / Numéro du contrat not yet assigned
Security Classification / Classification de sécurité Unclassified

PART C - (continued) / PARTIE C - (suite)

For users completing the form manually use the summary chart below to indicate the category(ies) and level(s) of safeguarding required at the supplier's site(s) or premises.

Les utilisateurs qui remplissent le formulaire manuellement doivent utiliser le tableau récapitulatif ci-dessous pour indiquer, pour chaque catégorie, les niveaux de sauvegarde requis aux installations du fournisseur.

For users completing the form online (via the Internet), the summary chart is automatically populated by your responses to previous questions. Dans le cas des utilisateurs qui remplissent le formulaire en ligne (par Internet), les réponses aux questions précédentes sont automatiquement saisies dans le tableau récapitulatif.

SUMMARY CHART / TABLEAU RÉCAPITULATIF

Category / Catégorie	PROTECTED / PROTÉGÉ			CLASSIFIED / CLASSIFIÉ			NATO				COMSEC					
	A	B	C	CONFIDENTIAL / CONFIDENTIEL	SECRET	TOP SECRET / TRÈS SECRET	NATO RESTRICTED / NATO DIFFUSION RESTREINTE	NATO CONFIDENTIAL / NATO CONFIDENTIEL	NATO SECRET	COSMIC TOP SECRET / COSMIC TRÈS SECRET	PROTECTED / PROTÉGÉ			CONFIDENTIAL	SECRET	TOP SECRET / TRÈS SECRET
											A	B	C			
Information / Assets / Renseignements / Biens																
Production																
IT Media / Support IT																
IT Link / Lien électronique																

12. a) Is the description of the work contained within this SRCL PROTECTED and/or CLASSIFIED? No / Non Yes / Oui
 La description du travail visé par la présente LVERS est-elle de nature PROTÉGÉE et/ou CLASSIFIÉE?

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification". Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire.

12. b) Will the documentation attached to this SRCL be PROTECTED and/or CLASSIFIED? No / Non Yes / Oui
 La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE?

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification" and indicate with attachments (e.g. SECRET with Attachments). Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire et indiquez qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).

ANNEX D, INSURANCE REQUIREMENTS

1. Insurance Requirements:

1.1. Commercial General Liability Insurance for not less than \$2,000,000 Canadian dollars per accident or occurrence and in the annual aggregate, inclusive of defence costs.

The insurance will include the following:

- a) Canada as an additional insured, as represented by the Department of Foreign Affairs, Trade and Development ;
- b) Bodily Injury and Property Damage to Third Parties;
- c) Product Liability and Completed Operations;
- d) Violation of Privacy, Libel and Slander, False Arrest, Detention or Imprisonment and Defamation of Character;
- e) Cross Liability and Separation of Insured;
- f) Employees and, if applicable, Volunteers as Additional Insured;
- g) Employer's Liability;
- h) Broad Form Property Damage;
- i) Non-Owned Automobile Liability;
- j) 30 days written notice of policy cancellation.

1.2. Errors and Omissions Liability Insurance

If the Consultant is a licensed professional, he will carry an errors and omissions liability insurance for not less than \$1,000,000 Canadian dollars per loss and in the annual aggregate, inclusive of defence costs.

The insurance will include the following:

- a) If the policy is written on a claims-made basis, coverage will be in place for a period of at least 12 months after the completion or termination of the Contract; and
- b) 30 days written notice of cancellation.

1.3. Workers' Compensation Insurance

Workers' Compensation Insurance for all Personnel in accordance with the statutory requirements of the Territory, Province, State of domicile or employment, having such jurisdiction. If the Consultant is assessed any additional levy, extra assessment or super-assessment by a Worker's Compensation Board or such other authority, howsoever caused, the Consultant will indemnify and hold harmless DFATD for any such liability. The Consultant will ensure that all of its Personnel performing the Services on this Contract will have the same level of Workers' Compensation Insurance throughout the Consultant's performance of the Contract.

The insurance will include the following:

- a) Canada as additional insured as represented by the Department of Foreign Affairs, Trade and Development, to the extent permitted by law;
- b) Cross Liability and separation of insured, to the extent permitted by law;
- c) Waiver of Subrogation Rights in favor of DFATD, to the extent permitted by law; and
- d) 30 days written notice of cancellation.

If the information is not provided in the bid, the Contracting Officer will so inform the Bidder and provide the Bidder with a time frame within which to meet the requirement. Failure to comply with the request of the Contracting Officer and meet the requirement within that time period will render the bid non-responsive.

1.4 War Risk Accidental Death and Dismemberment Insurance, for the Personnel working in areas considered to be war zones

The Contractor will ensure that all of its Personnel performing the Services on this Contract will have the same level of insurance coverage throughout the Contractor's performance of the Contract. The insurance will include the Waiver of Subrogation Rights in favour of DFATD, to the extent permitted by law.

2. Additional Insurance

The Consultant is responsible for deciding if insurance coverage is necessary to fulfill its obligation under the Contract and to ensure compliance with any applicable law. Any additional insurance coverage is at the Consultant's own expense, and for its own benefit and protection.

3. Insurance Certificates

If requested by the Contracting Authority, the Consultant must provide, within the timeframe indicated in the notice, the proof of insurance in the form of a certificate or certificates confirming that the insurance is in force. Coverage must be placed with an Insurer licensed to carry out business in Canada. The Consultant must, if requested by the Contracting Authority, forward to DFATD a certified true copy of all applicable insurance policies.

4. Litigation

In the event that DFATD is enjoined in any litigation arising from any claims, the Consultant must, within 10 Days of a request from DFATD, provide certified true copies of all applicable insurance policies to the Contracting Authority.

5. No Waiver

Compliance with the insurance requirements does not relieve the Consultant from or reduce its liability under any other provisions set forth under the Contract.

ANNEX E – FORMS

FORM TECH- 4

Bidder / Evaluation Personal Experience – Development Evaluation Assignment Conducted by Proposed Evaluation Personnel

Guidance to Bidders:

Using the format below, provide information on each assignment where the Bidder and/or a Member was carrying out consulting and professional services similar to the ones requested under this RFP.

Maximum four (4) pages per assignment

A. EVALUATION ASSIGNMENT INFORMATION
Evaluation Assignment Title:
Name of Bidder who performed services:
Name of client/ funding agency:
Name, telephone number and e-mail address of contact person:

B. RESOURCES PROVIDED BY THE BIDDER		
Duration of Evaluation Assignment		Evaluation Assignment Contract value:
Start date (year/month):	Completion date (year/month):	Total Contract Value: (In CAD)
Key Staff of the assignment: Name 1 Name 2 Name 3 Name 4 etc.	Functions: Evaluation Team Leader of the assignment: Senior Evaluator X: Senior Evaluator Y: Specialist B: etc.	Level of Effort: (# of days for name 1) (# of days for name 2) (# of days for name 3) (# of days for name 4) etc.
Name of associated firm(s), if any:	No. of person-days provided by associated firm(s):	

C. DESCRIPTION OF THE EVALUATION ASSIGNMENT AND EVALUAND
Rationale, Purpose and Specific Objectives of the Evaluation Assignment: (definition of the requirements: OECD/DAC (2010) <i>Quality Standards for Development Evaluation</i> (2010), Sections 2.1, 2.2)
Object and Scope: (definition of the requirement: OECD/DAC (2010) <i>Quality Standards for Development Evaluation</i> (2010), Sections 2.3)
Evaluand Name: (project name or program name or group of projects within a program name)
Brief description of the Evaluand: (for example: intervention logic; geographical area, target groups, organizational set-up; implementation arrangements; key dimensions covered by the evaluation and

policy and institutional context as necessary).	
Thematic coverage: (for example: agriculture, agricultural value-chain with an emphasis on extension)	
Stakeholders: Brief description of the key stakeholders of the evaluation	
Evaluand Time Period covered by the Evaluation Assignment (number of years):	Evaluand value [funds spent over the time period covered by the Evaluation Assignment] (In CAD):
From (month/year):	To (month/year):
Key Evaluation Questions (also known as issues or criteria): Summary of key questions from the Terms of Reference:	

D. SERVICES PROVIDED FOR THIS EVALUATION ASSIGNMENT
Brief Description of Services Provided for this Evaluation Assignment: (Only services provided by the Bidder should be indicated. Services provided by other partners or associated firms are to be excluded from this description.)
Brief Description of the Evaluation Assignment Methodology and its Application <ul style="list-style-type: none"> • The approach (conceptual framework): • Methodology: • Data collection and analysis methods used: • Data collection involving different types of stakeholders groups (indicate types): • Type(s) of sampling applied: • Measures used to ensure reliability and validity and methodological limitations:
Evaluation Assignment's Main Deliverables: (Only deliverables provided by the Bidder should be indicated. Deliverables provided by other partners or associated firm are to be excluded from this description.)

E. PROPOSED EVALUATION PERSONNEL EXPERIENCE WITH THE EVALUATION ASSIGNMENT	
Name of Proposed Individual	Proposed Evaluation Function (Evaluation Team Leader)
Roles and Responsibilities of the proposed individual for this Evaluation Assignment: (Clearly describe and indicate the involvement level (contributed to OR fully led, managed and conducted) of the proposed individual during each phase (design, implementation and reporting) of the evaluation assignment.	
In-country field work: Only list field work longer than two (2) weeks in a specific country/region	

FORM TECH- 6A
Curriculum Vitae for Proposed Personnel

Guidance to Bidders:

Using the format below, provide information on Assignments where the proposed personnel was carrying out consulting and professional services similar to the ones requested under this RFP.

Maximum five (5) pages per proposed personnel

Proposed position			
Name			
Education (type of degrees received, completion dates, granting recognized institution)			
Present employer and position (if applicable)			
Length of service with current employer and status (permanent, temporary, contract employee, associate, etc.)			
Personnel Experience: (repeat the box below for each Assignment as necessary)			
Assignment #____, Title:		Role of the Proposed Individual:	
Level of effort of the proposed resource for the assignment in days:		Geographical area – country(ies) / region(s) covered:	
Assignment start date (year/month):	Assignment end date (year/month):	Location of field work: Country X: Country Y:	Duration of field work (Level of Effort in days): Days for Country X: Days for Country Y:
Assignment Description:			
References (name, title, phone and email):			