



IDRC · CRDI

International Development Research Centre
Centre de recherches pour le développement international

REQUEST FOR PROPOSAL (“RFP”)

RFP #: 22230021	RFP Title: AIMS Mathematical Sciences for Climate Resilience End-of-Program External Evaluation
Issue Date: Friday, March 3, 2023	Close Date & Time: Friday, March 31, 2023, at 1:00 p.m. Eastern Daylight Time
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This RFP is subject to the rules on government procurement set out in Chapter 5 of the Canadian Free Trade Agreement (“CFTA”).

Table of Contents

SECTION 1 – INTRODUCTION	4
1.1 IDRC OVERVIEW	4
1.2 PURPOSE OF THIS RFP	4
1.3 DOCUMENTS FOR THIS RFP	4
1.4 TARGET DATES FOR THIS RFP	4
SECTION 2 – STATEMENT OF WORK	5
2.1 INTRODUCTION AND PROJECT OVERVIEW	5
2.2 Intended Users	5
2.3 Evaluation Objectives	6
2.4 DESCRIPTION AND SCOPE OF WORK	6
2.5 IDRC RESPONSIBILITIES, SUPPORT, AND REPRESENTATIVES	9
2.6 LOCATION OF WORK AND TRAVEL	9
2.7 PERIOD OF A RESULTING CONTRACT.....	9
SECTION 3 – PROPOSAL EVALUATION	10
3.1 EVALUATION COMMUNICATION.....	10
3.2 EVALUATION METHODOLOGY.....	10
3.3 PROPONENT FINANCIAL CAPACITY.....	11
3.4 PROPONENT SELECTION.....	11
SECTION 4 – PROPOSAL FORMAT	13
4.1 GENERAL	13
4.2 OFFICIAL LANGUAGES	13
4.3 ORGANIZATION OF RESPONSES.....	13
4.4 COVER LETTER	13
4.5 MANDATORY AND RATED REQUIREMENTS CHECKLIST	13
4.6 TECHNICAL PROPOSAL	14
4.7 FINANCIAL PROPOSAL	14
SECTION 5 – CONDITIONS	16
5.1 ENQUIRIES	16

5.2 SUBMISSION DEADLINE..... 16

5.3 PROPOSAL SUBMISSION INSTRUCTIONS 16

5.4 VALIDITY OF PROPOSAL..... 17

5.5 PROPONENTS COSTS 17

5.6 GOVERNING LAWS 17

5.7 CONFLICT OF INTEREST 17

5.8 RIGHTS OF IDRC..... 17

5.9 PROPOSED CONTRACT 18

ANNEX A – Proposed Contract 19

ANNEX B – Mandatory Requirements Checklist 31

ANNEX C – Rated Requirements Checklist..... 32

SECTION 1 – INTRODUCTION

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

1.1 IDRC OVERVIEW

IDRC was established by an act of Canada’s parliament in 1970 with a mandate “to initiate, encourage, support, and conduct research into the problems of the developing regions of the world and into the means for applying and adapting scientific, technical, and other knowledge to the economic and social advancement of those regions.” A **Canadian Crown corporation**, IDRC supports leading thinkers who advance knowledge and solve practical development problems. IDRC provide the resources, advice, and training they need to implement and share their solutions with those who need them most. In short, IDRC increases opportunities — and makes a real difference in people’s lives. Working with development partners, IDRC multiplies the impact of investment and brings innovations to more people in more countries around the world. IDRC offers fellowships and awards to nurture a new generation of development leaders. IDRC employs about **375** people at the **head office** located in Ottawa, Canada and in **five (5) regional offices** located in New Delhi-India, Montevideo-Uruguay, Amman-Jordan, Nairobi-Kenya, and Dakar-Senegal. IDRC is governed by a board of up to 14 governors, whose chairperson reports to Parliament through the Minister of International Development. For more details visit: www.idrc.ca

1.2 PURPOSE OF THIS RFP

IDRC requests proposals for the provision of consultant to undertake an external and independent final evaluation of the AIMS MS4CR program, where requirements are described in section 2, the Statement of Work (“Services”).

1.3 DOCUMENTS FOR THIS RFP

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

- This RFP document
- Annex A – Resulting Contract Terms and Conditions
- Annex B – Mandatory Requirements Checklist
- Annex C – Rated Requirements Checklist

1.4 TARGET DATES FOR THIS RFP

The following schedule summarizes significant target events for the RFP process. The dates may be changed by IDRC at its sole discretion and shall not become conditions of any Contract which may be entered into by IDRC and the selected Proponent.

Event	Date
RFP issue date	See page 1
Deadline for Enquiries	See section 5.1
RFP close date	See page 1
Commencement of Services	April, 2023

SECTION 2 – STATEMENT OF WORK

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

2.1 INTRODUCTION AND PROJECT OVERVIEW

The African Institute for Mathematical Sciences (AIMS) was established in 2003 in Cape Town, South Africa. Since then, it has expanded across the continent and established five centres of excellence for mathematical sciences in South Africa, Senegal, Cameroon, Ghana and Rwanda. AIMS is a pan-African network for the advancement of STEM, offering post-graduate training, research, and public outreach & engagement. The AIMS Master’s in Mathematical Sciences program is at the core of AIMS – the program trains some 250 talented young Africans each year and prepares them for leadership positions in education, research, government and the private sector. Research is also an integral part of AIMS, which includes a Research Master’s and PhD programs, Post-Doctoral Fellowships and Research Chair programs. International researchers partner with pan-African researchers and students at AIMS centres to pursue innovations in STEM and their application to society.

The AIMS Mathematical Sciences for Climate Change Resilience (MS4CR) Program was a six-year (2017-2023) CAD 20 million cost-shared initiative funded by Global Affairs Canada (GAC) through Canada’s International Development Research Centre (IDRC). The key objectives of the MS4CR program were to increase the contribution of African mathematical scientists in finding solutions to climate change-related challenges in Africa through training, internships, and research and to support the consolidation of AIMS’ operations across the continent through strengthening existing AIMS centres. These were to be achieved through five complementary interventions:

1. Master’s level training for 88 AIMS students with a focus on climate science;
2. Climate science research and grants for 3 research chairs, supported by 50 postgraduate researchers in addition to 16 small research grants;
3. Climate science fellowships for 20 women and funding to enable young women and girls to access opportunities such as STEM camps to learn about mathematics and climate science;
4. Internships for 100 students or alumni in the field of climate change; and
5. Consolidation of the AIMS network

To date, AIMS has graduated 168 (64 W, 104 M) climate science students, offered 18 (M14, W4) master’s research in climate science, 13 (7M, 6W) PhD. in climate science, 12 (8M, 4W) postdocs in climate science in addition to 19 (7W, 12M) small research grants. A total of 21 women climate science fellowships have also been awarded. One hundred and forty-two (142) (62 W 80 M) interns have also been facilitated in over 25 host institutions.

2.2 INTENDED USERS

Primary intended users of the evaluation will be AIMS management and staff, as well as IDRC and GAC as funders of the program. The evaluation is both an important learning and accountability exercise to identify and assess the impacts of the MS4CR program and inform future programming in the area of postgraduate training and research in mathematics and climate science in Africa. The evaluation will examine how AIMS training has evolved, including through the introduction of a climate change resilience component to the mathematical content and pedagogy, and through a greater focus on virtual teaching in the context of the COVID-19 pandemic. It will examine the strengths and weaknesses of the MS4CR program, against the backdrop as well as other comparable interventions in Africa, such as (but not limited to): the Africa Centres of Excellence (ACE) initiative; various centres, research chairs or similar entities established at African Universities; or other North-South collaborative research and/or training initiatives. These may be focused on mathematical sciences, climate change research or other related fields in the natural sciences. The

evaluation can also consider how it links to regional development priorities as well as the African Union's Science, Technology and Innovation Strategy for Africa (STISA-2024).

Finally, it is intended to reflect on the AIMS model for advancing higher education and research in mathematical sciences on the African continent. This could take as a starting point the significant consolidation efforts undertaken over the course of the MS4CR initiative, with a central international secretariat providing common services to national based centres. It would also be broad enough to cover a set of elements at the core of the AIMS model that includes, inter alia, how it is governed, how it delivers training, how it undertakes research, how it works with universities as well as national governments, and how it ultimately seeks financial sustainability.

2.3 EVALUATION OBJECTIVES

The key objectives of the evaluation are to:

- Assess the results achieved relative to the objectives and expected outcomes of the program, including by documenting any evidence of impacts and longer-term outcomes;
- Identify the key factors that impeded or facilitated the success of the program and how AIMS adapted to these challenges and opportunities, with particular reference to adaptations during the COVID-19 pandemic;
- Examine the overarching AIMS model in terms of its ability to sustainably deliver pan-African programming in higher education and research in mathematical sciences and benchmark the model against other comparable initiatives, organizations or networks on the continent;
- Examine the gender equality aspects of the program (e.g., progress in enrolling female students in the program) and the model of gender equality within AIMS;
- Make recommendations regarding future programming in the area of postgraduate training and research in mathematics and climate science in Africa, namely in the context of capacity-strengthening, research for development, and climate action objectives, among other AIMS, IDRC and GAC priorities;
- Make recommendations for the evolution of AIMS as an organization, based on key challenges and opportunities identified, a scan of the relevant landscape, and the AIMS 10-year Strategic Plan.

2.4 DESCRIPTION AND SCOPE OF WORK

2.4.1 Evaluation Scope:

The evaluation will focus primarily on the MS4CR program, from its inception in 2017 to present, but will also consider the broader context of the AIMS network and AIMS model, as discussed above. It will also take into account the MS4CR program in the context of the AIMS 10-year Strategic Plan, as well as the IDRC and GAC funding portfolio, in particular other training and research programming in Africa. The evaluation should be informed by previous related assessments such as the Mid-term evaluation of the AIMS-IDRC/DFID program (2010-2017)¹ and the recent Mid-Term Evaluation of the Mathematical Sciences for Climate Resilience (MS4CR) Programme at the African Institute for Mathematical Sciences (AIMS)².

It is expected that the evaluation will focus on the immediate outcome results and will comment on the extent to which the MS4CR program is progressing towards higher-level outcomes. To measure this progress, the evaluation will be guided by the MS4CR program's Performance Measurement Framework. The evaluation will also examine any external factors that may have impacted program implementation.

The evaluation will seek to capture information from a wide range of stakeholders, including:

- AIMS Executive Team, Senior Management, Academic Directors and relevant staff across the network;
- AIMS MS4CR lecturers and tutors;
- AIMS MS4CR students, interns, and alumni;

- External private sector, government, and academic stakeholders in the fields of science policy, climate research and mathematical sciences in Africa;
- AIMS Research staff;
- Employers of AIMS MS4CR interns and graduates; and
- IDRC and GAC staff.

2.4.2 Evaluation Methodology and Approach

The evaluation methodology should take a mixed methods approach (e.g., combining quantitative, qualitative, and participatory tools) to allow for the triangulation of information and assurance of accuracy. An inclusivity lens should be applied to all analysis, focusing not only on gender, but also other key determinants such as language, culture and income level, with a focus on marginalized and vulnerable groups. The evaluation envisages a combination of desk review of all relevant program documents; field visits to AIMS Rwanda and AIMS Secretariat; key informant interviews with select staff, partners, and donors; and focus group discussions with students, lecturers, tutors, and researchers; and survey of AIMS alumni. Some limited travel (e.g., to the AIMS Secretariat) may be desirable, but this depends on the methodology and approach proposed by the evaluators.

Geographically, this will focus on AIMS Rwanda and the AIMS Global Secretariat, both in Kigali, Rwanda. The Evaluation Team is expected to survey AIMS MS4CR students (current and alumni) and researchers to assess and document the perceptions and experiences of the program's direct beneficiaries, as well as to conduct virtual interviews or focus group discussions with other AIMS Centres in Senegal, Ghana, South Africa and Cameroon. The evaluation will be able to build on the data and findings from the mid-term review (see Section 2.4.1 above).

2.4.3 Key Evaluation Questions

Broadly, the final evaluation of the MS4CR program seeks to understand to what extent, and how efficiently the program delivered what it intended, both as a standalone program and in the context of the overall evolution of AIMS. It also seeks to understand the extent to what extent the program activities, outputs and outcomes—as well as those of AIMS more broadly—were relevant to and coherent with regional development objectives and initiatives. This lens will then enable the evaluation to draw lessons for future programming.

The following are potential specific questions that may be further refined and modified in the proposal as well as, subsequently, during the inception phase. Note that the evaluators should ensure that considerations related to gender equality and inclusion are addressed in responding to each question, as appropriate.

a. Relevance

- To what extent was the program able to adapt and respond appropriately to emerging challenges, needs and priorities of beneficiaries?
- To what extent did the program contribute to regional development objectives and a regional science, technology and innovation agenda?
- To what extent was the MS4CR program relevant to the development priorities of Africa, specifically in terms of higher education and research in climate science?
- Does the AIMS pedagogical approach provide a significant advantage with respect to traditional university programs, namely in terms of, inter alia, analytical rigour, critical thinking and leadership skills?
- Does the AIMS model respond to gaps in higher education and research in mathematical sciences, and does it address development objectives in Africa, including those related to climate change resilience?

What are areas (e.g., related to climate science) where AIMS could potentially have an impact in the future?

b. Effectiveness

- Were program activities delivered as planned? Were they rolled out successfully and as intended? What key factors influenced the achievement or non-achievement of the objectives of the MS4CR program? How adequate were the M&E mechanisms in responding to challenges, opportunities, etc.?
- What impact did the program have on its target beneficiaries? Is there any evidence that AIMS alumni will contribute to the further economic, political and educational advancement of the African continent?
- To what extent has the program been able to provide postgraduate opportunities for AIMS Alumni? What could be done differently to enhance postgraduate opportunities?

c. Efficiency

- Was the program implemented in the most cost-efficient means possible?
- Did the use of funds for the MS4CR program demonstrate value for money in terms of contributions to program objectives and to the long-term sustainability of AIMS?
- What are the strengths and weaknesses of the AIMS model and does it enable cost-efficient, responsive, and timely program delivery?

d. Sustainability

- How and to what extent are AIMS students, alumni, donors, and governments promoting the sustainability of AIMS' activities after the end of the program?
- How and to what extent has the financial stability of AIMS been improved? How successful has AIMS been in securing funding? How diversified are the sources of funding secured by AIMS? How can the organization's financial stability (sustainability) be improved?

These questions should directly lead to lessons and recommendations that can be provided to AIMS, IDRC and GAC for the design and development of future programs in higher education and research in mathematical and/or climate sciences in Africa.

2.4.4 Evaluation Milestones and Key Deliverables

The following is an approximate timeline, which will be finalized during the inception period in consultation with the evaluator and the Advisory Committee:

- 24 April 2023 – Inception meeting with Advisory Committee
- 1 May 2023 – Inception report due
- 2 June – Meeting with Advisory Committee including a detailed presentation on progress
- 17 July – Draft final evaluation report due, followed by meeting with Advisory Committee
- 15 August – Final evaluation report due

2.4.5 Project Budget

The estimated budget for this work is up to a maximum of 135,000 CAD including all fees and travel.

2.5 IDRC RESPONSIBILITIES, SUPPORT, AND REPRESENTATIVES

The evaluation will be overseen by IDRC's Education and Science Program. It will be guided by an Advisory Committee, composed of technical experts representing AIMS, IDRC and GAC. The evaluation team is expected to report to the Advisory Committee on a regular basis.

IDRC will identify a **Project Authority** to whom the successful Proponent will report during the period of a resulting Contract. The Project Authority will be responsible for coordinating the overall delivery of service, providing as required direction and guidance to the Proponent, monitoring Proponent performance and accepting and approving Proponent deliverables on behalf of IDRC. The Project Authority will ensure that appropriate subject matter experts from within IDRC are available to the Proponent to discuss and provide content material, as well as facilitate cooperation with regional IDRC staff and other stakeholders, as required.

IDRC will identify a **Contracting Authority**, who will oversee a resulting Contract throughout its lifecycle, in conjunction with the Project Authority and the Proponent, create amendments for any changes to a resulting Contract, and answer questions on terms and conditions.

2.6 LOCATION OF WORK AND TRAVEL

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

Travel may be requested by the Proponent, if the Proponent wishes to include travel as part of their proposal, all travel and travel related expenses should be on a separate line in the financial proposal. All travel must follow IDRC travel policy as indicated in Attachment B-Travel.

2.7 PERIOD OF A RESULTING CONTRACT

A resulting Contract is expected to commence in April 2023 and conclude by August 30, 2023.

SECTION 3 – PROPOSAL EVALUATION

This section describes the process that IDRC will use to evaluate Proposals and select a Lead Proponent.

3.1 EVALUATION COMMUNICATION

During Proposal evaluations, IDRC reserves the right to contact or meet with any individual Proponent in order to obtain clarification of its submission or to gain insight into the quality and scope of relevant services. A Proponent will not be allowed to add, change, or delete any information during the process. IDRC is in no way obligated to meet with any or all Proponents for this purpose.

3.2 EVALUATION METHODOLOGY

IDRC will use the following methodology to evaluate Proposals:

3.2.1 Step 1 - Mandatory Requirements

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

Summary Table:

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

3.2.2 Step 2 - Rated Requirements

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

Summary Table:

RFP Section	Rated Requirements	Weighting % A	*Points 0-10 B	Score A x B
Annex C	Organization section	40		
"	Methodology section	40		
	Total %	80		

*Points Table:

Points	Points Description
0	Barely addresses any of the stated requirements and completely lacking in critical areas
3	Adequately meets most of the stated requirements. May be lacking in some areas which are not critical
5	Meets most stated requirements
7	Meets all stated requirements
8	Meets all stated requirements and may exceed some
10	Exceeds the stated requirements in superlative and beneficial ways

3.2.3 Step 3 – Interviews

Proponents may be asked to provide additional information prior to the final selection. IDRC reserves the right to supply more information to those Proponents.

3.2.4 Step 4 – Financials

The total budget for the proposed approach will be a key factor in the selection of the team. Furthermore, the proposed budget breakdown and planned activities will be assessed to ensure that the approach is realistic and that the level of effort is commensurate with the proposed expenditures receiving a score out of 10.

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

RFP Section	Rated Requirements	Weighting A	Points 0-10 B	Score A x B
4.6	Total pricing, exclusive of taxes	10		
	Realistic approach and level of effort	10		
	Total %	20		

3.2.5. Step 4 - Final Score

Proponents' proposals will be calculated, and IDRC may select the Lead Proposal achieving the highest total points ("Lead Proponent"), subject to IDRC's reserved rights.

3.3 PROPONENT FINANCIAL CAPACITY

IDRC reserves the right to conduct an assessment of the **Lead Proponent's** financial capacity. IDRC may request that the Lead Proponent provide proof of financial stability via bank references, financial statements, or other similar evidence. This is a pass/fail test. Pass means that Contract discussions begin. Fail means that the Lead Proponent may not enter into Contract discussions and is disqualified from further consideration. The Lead Proponent must provide this information upon 72 hours of IDRC's request; failure to comply may result in disqualification.

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

3.4 PROPONENT SELECTION

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

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

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

Announcement of the successful Proponent will be made to all Proponents following the signing of a Contract no later than 72 days following the award of a Contract. Upon request from an unsuccessful Proponent, IDRC will provide the reasons why that particular proposal was not selected.

SECTION 4 – PROPOSAL FORMAT

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

4.1 GENERAL

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

4.2 OFFICIAL LANGUAGES

Proposals may be submitted in English or French.

4.3 ORGANIZATION OF RESPONSES

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

see RFP Section for full details	File	Contents
4.4	1.0	Cover Letter
4.5, Annex B, Annex C	2.0	Mandatory Requirements Checklist and Rated Requirements Checklist
4.6	3.0	Technical Proposal
4.7	4.0	Financial Proposal
5.9, Annex A	5.0	Objections with reasons regarding the proposed contract terms and conditions included in this RFP

4.4 COVER LETTER

The Proponent should provide *as a separate file*.

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

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

4.5 MANDATORY AND RATED REQUIREMENTS CHECKLIST

The Proponent should provide *as a separate file*.

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

***Example:**

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

***Hint:** copy the tables in **Annex B** and **C**

4.6 TECHNICAL PROPOSAL

The Proponent should provide *as a separate file*.

4.6.1 Table of Contents

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

4.6.2 Response to the Statement of Work

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

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

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

4.7 FINANCIAL PROPOSAL

The Proponent should provide *as a separate file*.

4.7.1 Financial Requirements

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

Financial Requirements
a. The Proponent is to state the assumptions underlying its financial proposal.
b. All prices are to be quoted in Canadian dollars (CAD) and be exclusive of the Goods and services Tax (GST) or Harmonized Sales Tax (HST). The GST or HST, whichever is applicable, shall be extra to the prices quoted by the Proponent and will be paid by IDRC. If the Proponent will not be charging IDRC taxes, an explanation should be provided. See the Notes below for more details on taxes.
c. All prices must include a detailed budget following the response to section 2 (Statement of Work). Prices shall include all components normally included in providing the proposed services such as professional fees and expenses, etc. e.g. All prices must include a detailed breakdown and include at a minimum the following: <ol style="list-style-type: none"> i. all inclusive daily rate applicable to proposed personnel who will do the work; ii. estimated total number of billable days to do the work; iii. estimated number of days to be spent in at IDRC’s Ottawa office, if applicable.

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

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

e. Proponents who must travel to Ottawa for onsite work must indicate if there will be fees chargeable to IDRC.

4.7.2 Mathematical Errors

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

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

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

SECTION 5 – CONDITIONS

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

5.1 ENQUIRIES

All matters pertaining to this RFP are to be referred exclusively to the RFP Authority named on page 1.

No verbal enquiries or verbal requests for clarifications will be accepted.

Proponents should, as much as feasible, aggregate enquiries and requests for clarifications and shall submit them **in writing via email** to the **RFP Authority** by Friday, March 10, 2023, at 11:00 a.m. EDT in order to receive a response prior to the close date. When submitting, Proponents *email subject line* should cite **“RFP # 22230021 - AIMS Mathematical Sciences for Climate Resilience End-of-Program External Evaluation”**.

The RFP Authority will provide **all answers to significant enquiries** received on Canada Buys without revealing the sources of the enquiries.

In the event that it becomes necessary to revise any part of the RFP as a result of any enquiry or for any other reason, **an Amendment** to this RFP will be issued and posted on <https://canadabuys.canada.ca/en>

Important note: Proponents must download all RFP documents directly from the Canada Buys website. IDRC will not distribute RFP documents that are posted on <https://canadabuys.canada.ca/en>.

5.2 SUBMISSION DEADLINE

IDRC will only accept proposals up the close date and time indicated on page 1.

Important note: Late proposals will not be accepted. No adjustments to proposals will be considered after the close date and time.

5.3 PROPOSAL SUBMISSION INSTRUCTIONS

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

5.3.1 Method of Sending

The preferred method of proposal submission is electronic, via **email**, in **Microsoft Word** or in **PDF** format to the RFP Authority named on page 1. Proponents *email subject line* should cite **“RFP # 22230021 - AIMS Mathematical Sciences for Climate Resilience End-of-Program External Evaluation”** when submitting via email.

Important Note: Email messages with large attachments can be slowed down in servers between the Proponent’s email and the RFP Authority’s email inbox. It is the Proponent’s responsibility to ensure that large emails are sent sufficiently in advance to be at IDRC by the close date and time. Proponents should use electronic receipt confirmation and or contact the RFP Authority to confirm receipt.

Important Note: The maximum size of an email that IDRC can receive is 10MB. If necessary, Proponents can send multiple emails.

5.3.2 Number of Files

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

5.3.3 Changes to Submission

Changes to the submitted proposal can be made, if required, provided they are received as an Addendum (or an Amendment) to, or clarification of, previously submitted proposal, or as a complete new proposal to cancel and supersede the earlier proposal. The addendum, clarification, or new proposal should be submitted as per the delivery instructions outlined above, be clearly marked "**REVISION**", and **must be received no later than the submission deadline**. In addition, the revised proposal should include a description of the degree to which the contents are in substitution for the earlier proposal.

5.3.4 Multiple Proposals

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

5.4 VALIDITY OF PROPOSAL

Proposals must remain open for acceptance for **ninety (90) days** after the close date.

5.5 PROPONENTS COSTS

All costs and expenses incurred by a Proponent in any way related to the Proponent's response to the RFP, including but not limited to any clarifications, interviews, presentations, subsequent proposals, review, selection or delays related thereto or occurring during the RFP process, are the sole responsibility of the Proponent and will not be chargeable in any way to IDRC.

5.6 GOVERNING LAWS

This RFP is issued pursuant to the laws of the province of Ontario and the laws of Canada.

5.7 CONFLICT OF INTEREST

In submitting a Proposal, the Proponent must avoid any real, apparent or potential conflict of interest and will declare to IDRC any such conflict of interest.

In the event that any real, apparent, or potential conflict of interest cannot be resolved to the satisfaction of IDRC, IDRC will have the right to immediately reject the Proponent from consideration and, if applicable, terminate any Contract entered into pursuant to this RFP.

5.8 RIGHTS OF IDRC

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

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

Without limiting the foregoing, IDRC reserves the right to:

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

5.9 PROPOSED CONTRACT

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

Important note: The Proponent should outline any objections with reasons to any terms and conditions contained in this RFP and include them in its proposal (reference section **4.3**). Failure to identify objections at the proposal stage may preclude Proponents from raising these objections in the course of any future negotiations.

ANNEX A – Proposed Contract Specific Terms and Conditions of the Contract

CONTRACT NO. _____

This Contract is between _____ (“**Consultant**”) and Canada’s **International Development Research Centre**, 45 O’Connor Street, Suite 500, Ottawa, ON, K1P 1A4 (“**IDRC**” or “the **Centre**”).

The parties agree as follows:

1. TERMS OF REFERENCE AND SCHEDULE

1.1 Summary

1.2 Scope

1.3 Schedule

1.4 Contract Resources

The following individuals are the main contacts for this Contract:

1.4.1 IDRC will be represented by:

1.4.2 The Consultant will be represented by:

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

1.5 Service Location

1.6 Service Engagement Process

1.7 Change Management

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

2. FEES

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

3. TRAVEL AND TRAVEL EXPENSES

4. INVOICES

4.1 Invoice Schedule

The Consultant shall invoice IDRC according to the following schedule:

4.2 Invoice Submission Instructions

Invoices and any required backup documentation must be sent electronically to:

invoices-factures@idrc.ca

Invoices must be set out as follows:

- IDRC's **Contract number**
- Invoice number
- Invoice Date
- Fees - detailed description, daily rate and number of days or unit rate and number of units or fixed price
- Travel expenses, if applicable – detailed description, quantity, and price (and include any required back up documents with invoice)
- Taxes - Canadian GST (Goods and Services Tax) or HST (Harmonized Sales Tax), as applicable; Consultants not registered for Canadian GST purposes must itemize the taxes they paid and are charging back to IDRC
- Canadian GST/HST registration number, if applicable
- Currency

5. PAYMENTS

5.1 Payment Inquiries

Payment inquiries should be sent electronically to:

ap-cc@idrc.ca

5.2 Payment Method

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

5.3 Advance Payments

IDRC will make no advance on fees and travel expenses.

5.4 Conditions Precedent for Payment

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

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

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

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

IDRC will not pay more than one (1) day of fees per 24-hour period. IDRC will not pay any fee nor any travel expenses incurred after the Termination Date of the Contract.

Following the Termination Date, and payment of the final invoices, all taxes due and owing in relation to the provision of Services pursuant to this Contract are deemed to have been paid by IDRC. The Consultant will be liable for any tax claims, debts, actions or demands in relation to the Services provided pursuant to this Contract (hereinafter referred to as "Tax Claims") and the Consultant shall indemnify and hold IDRC harmless against said Tax Claims.

6. SPECIAL CONTRACT CONDITIONS

7. CONTRACT DOCUMENTS

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

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

8. CONTRACT ACCEPTANCE AND SIGNATURES

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

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

CONSULTANT

By: _____
Signed

Printed Name

Title

Date

IDRC

By: _____
Signed

Printed Name

Title

Date

Attach:

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

ATTACHMENT A - General Terms and Conditions of the Contract

A1. DEFINITIONS

For the purposes of this Contract:

“Commencement Date” shall mean the date on which the Services are to commence.

“Confidential Information” shall mean any and all technical and non-technical information including patent, copyright, trade secret, and proprietary information, techniques, sketches, drawings, models, inventions, know-how, processes, apparatus, equipment, algorithms, software programs, software source documents, source codes, and formulae related to the current, future, and proposed products and services of IDRC, and includes, without limitation, IDRC's information

concerning research, experimental work, development, design details and specifications, engineering, financial information, procurement requirements, purchasing, manufacturing, and marketing plans and information.

“Consultant” shall mean either the individual, institution, corporation or partnership retained pursuant to this Contract, and its employees, directors, officers, partners, subcontractors and agents, as applicable, and any other representative for whom the Consultant is responsible at law.

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

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

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

“Derivatives” shall mean: 1. any translation, abridgement, revision, or other form in which an existing work may be recast, transformed, or adapted; 2. for patentable or patented material, any improvement thereon; and, 3. for material which is protected by trade secret, any new material derived from such existing trade secret material, including new material which may be protected by copyright, patent, and/or trade secret.

“IDRC” or *“the Centre”* means the International Development Research Centre.

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

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

A2. TIME OF ESSENCE

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

A3. ENTIRE AGREEMENT

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

A4. NON-EXCLUSIVITY

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

A5. WARRANTY

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

A6. TAXES

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

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

A7. INVOICES

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

A8. PAYMENTS

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

A9. TERMINATION

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

- a) The Consultant breaches any material term of this Contract, and fails to remedy such breach within thirty (30) calendar days of receiving notice to do so by IDRC.
- b) IDRC, in its sole discretion, determines that the Consultant made a misrepresentation during the process of selection.
- c) The Consultant:
 - i. ceases to carry on business,
 - ii. commits an act of bankruptcy within the meaning of the Bankruptcy and Insolvency Act (*Bankruptcy and Insolvency Act, R.S., 1985, c. B-3*) or is deemed insolvent within the meaning of the Winding-up and Restructuring Act (*Winding-up and Restructuring Act, R.S., 1985, c. W-11*) or makes an assignment, against whom a receiving order has been made under the applicable bankruptcy legislation or in respect of whom a receiver, monitor, receiver-manager or the like is appointed, or
 - iii. becomes insolvent or makes an application to a court for relief under the Companies' Creditors Arrangement Act, the Bankruptcy and Insolvency Act or the Winding Up and Restructuring Act (*Companies' Creditors Arrangement Act, R.S., c. C-25*) or comparable local legislation.

Termination without Cause: IDRC may at any time by notice in writing suspend the work of the Consultant or any part thereof. This Contract may be terminated in its entirety or in part by IDRC upon written notice. On such termination or suspension, the Consultant shall have no claim for damages, compensation, or loss of profit against IDRC except

payment for Services performed and Deliverables submitted up to the date of notice of such suspension or termination, or completed thereafter in accordance with the notice.

A10. INSURANCE

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

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

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

A11. USE OF IDRC PROPERTY

Access to Information Systems and Electronic Communication Networks: During the course of this Contract, the Consultant may be provided with access to IDRC information systems and electronic communication networks. The Consultant, on behalf of its/his/her employees, subcontractors and representatives, agrees to abide by IDRC policies concerning use of such information systems and networks. IDRC will provide the Consultant with any such policies upon commencement of Services pursuant to this Contract, or as such policies are put into effect, and the Consultant will make such policies known to its personnel, and will take such steps as are necessary to ensure compliance with such policies.

Access to IDRC Premises: The parties agree that reasonable access to IDRC’s premises by Consultant’s authorized personnel and which is necessary for the performance of the Services hereunder, in accordance with the terms of this Contract, shall be permitted during normal business hours of IDRC. The Consultant agrees to observe all IDRC security requirements and measures in effect at IDRC’s premises to which access is granted by this Contract.

A12. SUB-CONTRACTORS, SUCCESSORS AND ASSIGNEES

The Consultant is prohibited from entering into any sub-contract, designating any successor or assigning any rights under this Contract without the express written consent of IDRC.

A13. RELATIONSHIP WITH IDRC

Nothing in this Contract shall be deemed in any way or for any purpose to constitute the parties hereto partners in the conduct of any business or otherwise. The Consultant shall have no authority to assume or create any obligation whatsoever, expressed or implied, in the name of IDRC, or to bind IDRC in any manner whatsoever.

The Consultant acknowledges and agrees that, in carrying out this Contract, the Consultant is acting as an independent contractor and not as an employee of IDRC. The Consultant shall be responsible for all matters related to it or its employees including but not limited to deducting or remitting income tax, Canada Pension Plan contributions, Employer Insurance contributions or any other similar deductions required to be made by law for employees. The Consultant agrees to indemnify IDRC in respect of any such remittances which may be subsequently required by the relevant authorities, together with any related interest or penalties which IDRC may be required to pay.

A14. CONFIDENTIALITY OF INFORMATION

Non-Disclosure and Non-Use of Confidential Information: The Consultant agrees that it will not, without authority, make use of, disseminate or in any way disclose any Confidential Information to any person, firm or business.

The Consultant shall take all reasonable precautions at all times (and in any event, efforts that are no less than those used to protect its own confidential information) to protect Confidential Information from disclosure, unauthorized use, dissemination or publication, except as expressly authorized by this Contract.

The Consultant agrees that it, he, or she shall disclose Confidential Information only to those of its, his, or her employees or subcontractors who need to know such information and certifies that such employees or subcontractors have previously agreed, either as a condition to employment or service or in order to obtain the Confidential Information, to be bound by terms and conditions substantially similar to those of this Contract.

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

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

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

A disclosure of Confidential Information (1) in response to a valid order by a court or other governmental body, (2) otherwise required by law, or (3) necessary to establish the rights of either party under this Contract, shall not be considered to be a breach of this Contract or a waiver of confidentiality for other purposes; provided, however, that the Consultant shall provide prompt written notice thereof to enable IDRC to seek a protective order or otherwise prevent such disclosure.

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

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

This section shall survive the termination of this Contract.

A15. ASSIGNMENT OF COPYRIGHT AND WAIVER OF MORAL RIGHTS

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

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

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

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

The Consultant covenants that no Services or Deliverables to be provided to IDRC under this Contract will infringe upon or violate the rights of any third parties, including such parties' intellectual property rights. Without limiting the generality of the foregoing, the Consultant represents and warrants that no Services or Deliverables provided pursuant to this Contract will infringe any existing patent, trade mark, trade secret or copyright registered or recognized in Canada or elsewhere, with respect to or in connection with the intended use of the Services or Deliverables by IDRC.

The Consultant agrees to indemnify and hold IDRC harmless from and against any and all damages, costs, and expenses (including court costs and reasonable legal fees) incurred by IDRC as a result of the infringement or alleged infringement of any third party intellectual property rights, and further agrees to defend and participate in the defence of any claim or suit alleging that IDRC has a liability in this regard.

This section will survive termination of the Contract.

A17. CONFLICT OF INTEREST

The Consultant must avoid participating in activities or being in situations that place it, him, or her, in a real, potential or apparent conflict of interest that has the potential of influencing the Services and Deliverables being contemplated by this Contract.

The Consultant must not accept, directly or indirectly, for themselves or on behalf of any person or organization with whom they are in a close social, family or economic relationship, any gift, hospitality, or other benefit from any person, group, or organization having dealings with IDRC where such gift, hospitality, or other benefit could reasonably foreseeably influence the Consultant in the exercise of its, his or her official duties and responsibilities pursuant to this Contract.

A18. COMPLIANCE WITH LAWS

In performing services under this Contract, the Consultant shall be responsible for complying with all legislation of the country (countries) in which it, he, or she must work (including but not limited to laws pertaining to immigration, taxation, customs, employment and foreign exchange control).

It is the individual's responsibility to comply with the travel visa regulations of any country visited or in transit.

The overhead (included in fees) and allowances paid under this Contract include provision for complying with national legislation of the countries the Consultant may visit (including Canada). IDRC will not entertain any claim for work visas, work permits, etc., or any other costs relating to compliance with the national legislation of any country in the world.

A19. GOVERNING LAW

This Contract shall be governed and construed in accordance with the laws of the Province of Ontario, Canada. Where a dispute cannot be resolved by mutual agreement, the parties agree that any legal action or claim must be brought

before the courts of the Province of Ontario, Canada, which will have exclusive jurisdiction over all such actions and claims.

A20. SEVERABILITY

The provisions of this Contract are severable, and the invalidity or ineffectiveness of any part shall not affect or impair the validity and effectiveness of remaining parts or provisions of this Contract.

A21. WAIVER

Failure by a party to enforce any right or to exercise any election provided for in this Contract shall not be considered a waiver of such right or election. The exercise of any right or election of this Contract shall not preclude or prejudice a party from exercising that or any other right or election in future.

A22. FORCE MAJEURE

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

A23. NOTICES

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

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

A24. REVIEW AND AUDIT

The Consultant agrees, if IDRC so requests at any time up to two (2) years following the Termination Date to:

- a) submit a complete financial accounting of expenses, supported by original (or certified copies of) invoices, timesheets or other documents verifying the transactions (excluding any receipts which have been submitted at the time of invoicing as deemed necessary according to the terms of the Contract);
- b) give officers or representatives of IDRC reasonable access to all financial records relating to the Services and Deliverables to permit IDRC to audit the use of its funds. This shall include books of account, banking records and, in the case of individuals, credit card statements.

This section will survive termination of the Contract.

A25. LANGUAGE

The parties have requested that this Contract and all notices or other communications relating thereto be drawn up in English. Les parties ont exigé que ce contrat ainsi que tous les avis et toutes autres communications qui lui sont relatifs soient rédigés en Anglais.

ATTACHMENT B – Travel and Travel Expenses

B1.GENERAL

B1.1 Travel Expenses

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

B1.2 Travel Approval

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

B1.3 Arrangements for visas, passports, immunization, and prophylaxis medication are the responsibility of the Consultant. **Costs** associated with these items are also the responsibility of the Consultant.

B1.4 Travel Insurance, Personal Safety and Health

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

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

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

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

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

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

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

B1.5 Air/Rail Travel Booking Process

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

B1.6 Hotel Booking Process

Consultant pays the hotels directly (reference **section B2.2**).

B1.7 Travel Time

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

B2. TRANSPORTATION AND LIVING ALLOWANCE EXPENSES

IDRC agrees to cover the following transportation and living expenses provided in the tables below, to a maximum of _____.

B2.1. Travel Expenses-Transportation

-Rates are per person.

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

Transportation Travel Expense Description	Arranged by	Rate	Receipts required with invoice
Air travel	Consultant	Economy Class	n/a

B2.2. Travel Expenses-Living Allowance

-Rates are per person.

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

Living Allowance Travel Expense Description	Arranged by	Rate	Receipts required with invoice
Daily Living Allowance While in ___ city and ___ country, this living allowance covers the cost of accommodations, meals, laundry, local telephone calls, and gratuities. **to be included on invoices**	Consultant	As per https://www.idrc.ca/en/diems	No

ANNEX B – Mandatory Requirements Checklist

INSTRUCTIONS:

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

PART 1: *General Mandatory Requirements of this RFP*

These general Mandatory Requirements will be confirmed by IDRC:

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

PART 2: *Statement of Work Mandatory Requirements*

As stated in **Section 4.6 Response to the Statement of Work**, the Proponent **must provide detailed information relative to each mandatory requirement**. Indicate in the table, where in the Proponent's Proposal the response to the mandatory requirement can be found:

Mandatory Requirements in Response to the Statement of Work:

#	Mandatory Requirements	Compliant (yes or no)	Response
	Requirements		
M1.	The proponent must include as part of their proposal a proposed approach, evaluation framework and detailed methodology (7 pages max.)		
M2.	The Proponent shall include up to 5 CVs of the lead evaluator(s) and other key staff (3 pages max. per CV)		
M3.	The proponent must include as part of their proposal a description of lead organization, team and previous evaluations completed that are relevant and comparable to this assignment (2 pages max.)		
M4.	The Proponent shall include as part of their proposal all the key activities and timeline (2 pages max.)		

ANNEX C – Rated Requirements Checklist

INSTRUCTIONS:

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

As stated in **Section 4.6 Response to the Statement of Work**, the Proponent **must provide detailed information relative to each Rated Requirement**. Indicate in the table, where in the Proponent's Proposal the response to the Rated Requirement can be found:

Example:

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

RATED REQUIREMENTS:

Rated Requirements in Response to the Statement of Work:

#	Rated Requirements	Weight	Response
	Organization and personnel	40	
R1.	The selected evaluation team should include 2-3 experienced evaluators with technical expertise and may be supported by additional personnel. None of the lead evaluators should have previously been involved in the implementation of the MS4CR program or been a part of the AIMS network (excluding as arm's-length consultants such as for evaluation purposes). The selected team should clearly demonstrate, through past experience, an ability to effectively manage and mobilize resources in order to undertake a large-scale evaluation in a relatively short time frame.	12	
a)	The lead evaluators must collectively meet all of the following criteria: <ul style="list-style-type: none"> • Extensive experience (over 10 years) in undertaking evaluations in the fields of higher education and/or science, technology & innovation in Africa • Advanced degrees (Master's or above) in areas related to international development, science policy or mathematical sciences • Extensive experience (over 10 years) in conducting evaluations using advanced qualitative and quantitative methodologies • Extensive experience (over 10 years) working in Africa in areas related to the natural sciences or to research for development. • Fluency in English and French 	20	
b)	Preference may be given to teams whose lead evaluator(s) have experience (over 5 years) directly related to mathematical sciences	2	
c)	Preference may be given to teams whose lead evaluator(s) have experience (over 5 years) directly related climate science	2	

d)	Preference may be given to teams whose lead evaluator(s) have a PhD in a discipline related to international development, science policy or mathematical sciences	2	
e)	Preference may be given to teams based in or with significant presence in Africa	2	
METHODOLOGY		40	
R2.	<p>Understanding of the Statement of Work</p> <p>The Proponent should demonstrate that it has:</p> <ol style="list-style-type: none"> A complete understanding of the objectives and requirements in the Statement of Work A solid understanding of the issues related to higher education and research in mathematical sciences in Africa A solid understanding of evaluation methods that are suitable for suitable for addressing the key evaluation questions and evaluation objectives listed in this Terms of Reference 	30	
R3.	<p>Approach</p> <p>The Proponent should describe its approach to successfully deliver the requirements detailed in the Statement of Work, by using state-of-the-art, innovative methodologies, and include a draft project schedule detailing milestones.</p>	10	