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International Development Research Centre
Centre de recherches pour le développement international

REQUEST FOR PROPOSAL (“RFP”)

RFP #: 21220005	RFP Title: Monitoring, Evaluation and Learning Assignment for the AI4D Africa Initiative
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SECTION 1 – INTRODUCTION

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

1.1 IDRC OVERVIEW

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

1.2 PURPOSE OF THIS RFP

IDRC requests proposals from experienced consulting firms and/or groups of experts that are based in Sub-Saharan Africa and specialized in monitoring, evaluation and learning (MEL) and adaptive program management, 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	August 9, 2021
Deadline for Enquiries	September 3, 2021
RFP close date	September 13, 2021
Commencement of Services	October 2021

SECTION 2 – STATEMENT OF WORK

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

2.1 INTRODUCTION AND PROJECT OVERVIEW

In 2020, IDRC and Sweden’s International Development Cooperation Agency (Sida) launched the [Artificial Intelligence for Development in Africa](#) (AI4D Africa) program. This four-year, \$20 million dollar partnership seeks to improve the quality of life for all in Africa and beyond by partnering with Africa’s science and policy communities to leverage AI through high-quality research, responsible innovation, and talent strengthening.

Like the internet, artificial intelligence (AI) systems are rapidly becoming a new layer of infrastructure with transformative potential. Powered by the increasing availability of computational power, improved connectivity, and big data, AI applications offer exciting possibilities for contributing to achievement of the Sustainable Development Goals through spurring start-ups, improving food systems, enabling higher quality education systems, and tackling pressing health and climate challenges, among others.

In line with its vision to shape AI in Africa as a force for good, the AI4D Africa partnership seeks to advance the African-led development of a responsible (ethical, rights-respecting, inclusive, and sustainable) AI. AI4D Africa support is structured around three critical pillars:

- **Innovation to address Africa’s development challenges through responsible AI:** AI4D Africa will support five pan-African innovation research networks. Each network will be coordinated by an African institution who will support a network of AI researchers and practitioners. AI4D Africa is also supporting calls for small grants for AI innovations with the goal of strengthening the capacity of African innovators to scale their impact.
- **Policy research to promote and support responsible AI:** The policy stream supports AI policy research to inform and facilitate the development of public policies and regulations that promote the inclusive benefits of AI, while mitigating the potential costs and risks. The main line of work program supports two research to policy think-and-do tanks in Anglophone Africa and one policy network in Francophone Africa. AI4D Africa also supports a Responsible AI Observatory and work with policy makers to develop a model African AI policy.
- **Amplify African talent to develop and deploy responsible AI:** We develop and nurture local talent that responds to the capacity requirements of the public and private sector with a focus on the next generation of PhD students, post-doctoral students, and early career academics focused on responsible AI. To accomplish this, we support two multidisciplinary AI4D labs at public universities (one francophone, one anglophone) and a series of AI4D scholarships.

For more information, please refer to the original [AI4D Program Proposal](#) as well as the [AI4D Africa website](#).

2.2 AI4D AFRICA IMPLEMENTATION COMMITTEE

IDRC is responsible for the overall implementation of the AI4D Africa program. Core to delivering on AI4D Africa’s mission are the 15 lead implementing agencies who implement the activities listed in the three pillars mentioned above. Each implementing organization (some of whom are still being competitively selected) will be part of the

Implementation Committee (IC) which will have the mandate to ensure African leadership of the initiative, strengthen alignment of program activities with the goals of the initiative, and promote cross-initiative sharing and learning. The implementing organizations will include at least two multi-disciplinary AI research laboratories, the scholarship manager, two policy think and do tanks, francophone policy network hub, five innovation research network hubs, two small grant organizations, the African Observatory on Responsible AI, and the organization managing the model AI policy work. Note that there is a possibility the number of organizations in the IC could grow depending upon emergent funding activities. Many of the implementation organizations work with a network of sub-grantees and consortia partners to advance their objectives. A key role of the IC is to provide strategic leadership and guidance for the program during implementation.

2.3 OBJECTIVES OF THE ASSIGNMENT

The Proponent shall propose the most suitable approach to co-design and implement a three-year monitoring, evaluation, and learning (MEL) strategy that drives the program adaptation and strategic decision making with key implementing partners of the AI4D Africa initiative. Given AI4D Africa focuses on flexible, iterative, and participatory principles, potential approaches include utilization-focused evaluation, developmental evaluation, program theory driven evaluation, outcome mapping, and culturally responsive evaluation among others. The services will include periodic, timely, accurate, and actionable feedback to allow for the adaptive and participatory management of the initiative.

2.3.1 Focus of the MEL efforts

Activities should be conducted in a way to establish one common vision for all implementing organizations and to develop a sense of ownership that will help to sustain the initiative beyond the funding period.

Example potential MEL questions that could be explored include, but are not limited to:

- To what extent is AI4D Africa program achieving its intended outcomes? What challenges is AI4D Africa facing in making progress to this end? What factors appear to be facilitating success?
- How well, and in what ways, is AI4D Africa's knowledge sharing, capacity development, and knowledge mobilization gaining traction in policy dialogues at country level?
- How well, and in what ways, are AI4D Africa activities, outputs and outcomes integrating and supporting gender equity and social inclusion? Where is there opportunity for improvement?
- How well, and in what ways, are AI4D Africa innovation activities supporting the development of stronger research and development innovation ecosystems?
- How well, and to what extent, are Francophone organizations and countries incorporated in the program?
- How effective and efficient are the AI4D Africa governance and management structure and processes?

Note that these MEL questions are illustrative. They are listed to give an idea of the scope of work to potential applicants, however, they will need to be revisited and refined with the IC during the inception phase of this project (and periodically as needs change during the 3 years).

2.3.2 MEL Activities

We look to the applicants to suggest a suitable MEL approach, however, we anticipate that the following activities are indicative of the type of work that the team will perform.

Support the co-creation of an Adaptive Management MEL strategy with the active engagement of the AI4D Africa Implementation Committee, as well as IDRC and Sida. These activities are in alignment with supporting Objective 1 noted under the “Objectives of the Assignment.”

- Facilitate IC’s reflection on the original theory of change and propose adjustments at the beginning of the MEL effort and periodically throughout the lifecycle of the program, if required;
- Support the IC to identify and prioritize relevant MEL questions;
- Co-lead efforts to measure, track and report on outcomes and impact of the initiative; and
- Co-design a learning strategy which will provide organizational and thematic learning for the IC and the initiative.

Implement the MEL strategy, ensuring an African-led leadership for the initiative and enhancing collaborations and synergies across the AI4D Africa initiative. These activities are in alignment with supporting Objective 2 and 3 noted under the “Objectives of the Assignment.”

- Facilitate the MEL strategy ensuring the engagement with the IC is not overly burdensome;
- Co-develop monitoring and reporting tools to track and generate insights and findings that are practical and useful for the ongoing development of the initiative;
- Coach and support implementing agencies to lead and strengthen reporting efforts;
- Build in continuous questioning, reflection, and learning opportunities;
- Ensure African leadership throughout all activities;
- Revisit and adapt the MEL strategy as required to adapt to changes and emerging needs; and
- Produce an inception report, yearly reports and a final report upon completion of the assignment.

2.3.3 Intended users and uses

We anticipate that the primary intended users of the insights that result from the MEL activities will be:

- AI4D Africa’s Implementing Committee - to inform future strategic decisions of the program and actions of the implementation organizations.
- IDRC AI4D Africa team: to inform adaptations and changes in program implementation and improve support to implementing organizations.

Secondary users could include:

- Sida management team –The MEL process will also inform technical reporting by IDRC to Sida as well as any potential future program evaluations.
- Other donors and funders of Artificial Intelligence in Africa - They will likely be interested in the MEL’s insights but will not be involved or engaged in the process.

2.3.4 MEL Principles

The procedures employed by the selected team will be expected to uphold the [African Evaluation Guidelines](#), published by the African Evaluation Association in 2020. In addition, we recommend that applicants familiarize themselves with the evaluation principles articulated in [Evaluation at IDRC](#).

2.4 DESCRIPTION AND SCOPE OF WORK

2.4.1 Project Scope

In Scope:

The AI4D Africa initiative requests proposals for the provision of MEL services for the duration of the initiative (about 36 months spanning from 2021 to 2024). Throughout the three-year period, it is expected that the MEL

team provides ongoing support for learning and reporting. This is expected to be done virtually, with some travels and monitoring visits should the global context in the post-pandemic context allows for it, and the nature of the services will evolve to reflect ongoing priorities and needs.

An inception report with the proposed participatory and adaptive MEL tools should be submitted three months after contract signature. Yearly reports will be expected to highlight challenges, lessons learned and recommendations progress toward the objectives. These are the minimal expectations, but other complementary forms of communications, such as briefs and infographics, are welcome.

IDRC reserves the right to close the contract if performance is not satisfactory. Assessment of performance will be conducted yearly to ensure progress and alignment on the vision and accompaniment of the MEL providers.

2.4.2 Eligibility

IDRC is looking for proposals from consulting firms and/or groups of experts that:

- Have their headquarters based in Sub-Saharan Africa;
- Have a proven record of MEL and adaptive management practices in different regions of Africa; and
- Have the ability to work in both English and French at a minimum.

2.4.3 Desired Competencies

AI4D Africa seeks to recruit an experienced consulting firm or group of experts with the following competencies and expertise:

- Participatory evaluation methodologies;
- Adaptive management approaches for continued learning and engagement;
- Cross-cultural facilitation skills in both English and French;
- Track record of M&E services in relevant thematic areas such as research for development, artificial intelligence for development, digital technologies, gender equality and diversity/inclusion;
- Adult education, advisory/coaching experience and facilitation principles and practices;
- Strong knowledge of and work experience in different African contexts (including francophone Africa);
- Strong interpersonal and communication skills; and
- Gender balance among the MEL team.

2.4.4 Project Budget

The budget available for this work is CAD\$200,000. Should the global context post COVID-19 allow for it, some travels in sub-Saharan Africa will be required from the evaluators to visit implementing agencies and partners, join annual learning events, meetings, and key strategic events. Travelling costs should be embedded in the budget. We anticipate that no travel will be possible for at least the first 6-months of contract.

2.5 IDRC RESPONSIBILITIES, SUPPORT, AND REPRESENTATIVES

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

IDRC will identify a **Travel Administrative Representative**, who will manage all travel requirements approved by the Project Authority.

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

2.6 LOCATION OF WORK AND TRAVEL

Work is expected to mainly take place at the Proponent's site. Travel may be required by the Proponent, should the global context post COVID-19 allow for it.

2.7 PERIOD OF A RESULTING CONTRACT

A resulting Contract is expected to be for a period of about three years, ending in December 2024. It is estimated that the time required for this evaluation approach would be around 200 days.

SECTION 3 – PROPOSAL EVALUATION

This section describes the process that IDRC and Sida will use to evaluate Proposals and select a Lead Proponent. Note that the contract with the selected Proponent will be signed and managed by IDRC directly, as the lead implementing agency for the AI4D Africa initiative.

3.1 EVALUATION COMMUNICATION

During Proposal evaluations, IDRC and Sida reserve 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 and Sida are in no way obligated to meet with any or all Proponents for this purpose.

3.2 EVALUATION METHODOLOGY

IDRC and Sida will form a review committee of at least 3 members. They 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%	*Points 0-10	Score
		A	B	A x B
Annex C	Team composition and expertise	40		
"	Technical proposal	45		
"	Presentation and quality of proposal	10		
	Total %	95		

*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

Should the competition be tight between the two top contenders, Proponents may be asked to participate in a 30-minute interview with the review committee and/or 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

Proponents' Financial Proposals will be scored. The Proponent submitting the lowest price will receive the maximum 5 points on the standard evaluation scale of 0-5. All other Proponents will receive a prorated score out of 5 based on the relative proportion of their price to the lowest price submitted. The evaluation team will also review the financial proposals based on the billable hours, daily rate versus total price and those proposals determined to be best overall value will receive an additional point.

RFP Section	Rated Requirements	Weighting A	Points 0-5 B	Score A x B
4.6	Total pricing, exclusive of taxes	5		
	Total %	5		

3.2.5. Step 4 - Final Score

Scores for the 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) or A4 formats, 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 “xxx”, 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 in **Annex A**;
- b. Each **Mandatory Requirement** in **Annex A**; and
- c. Each **Rated Requirement** in **Annex A**.

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

- d. Included annexes: Abridged CVs of key team members (CVs should be no longer than three pages);

4.7 FINANCIAL PROPOSAL

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

4.7.1 Financial Requirements

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

Financial Requirements
a. The Proponent is to state the assumptions underlying its financial proposal.
b. All prices are to be quoted in Canadian dollars (CAD) and be exclusive of the Goods and services Tax (GST) or Harmonized Sales Tax (HST). The GST or HST, whichever is applicable, shall be extra to the prices quoted by the Proponent and will be paid by IDRC. If the Proponent will not be charging IDRC taxes, an explanation should be provided. See the Notes below for more details on taxes.
c. All prices must include a detailed breakdown following the response to section 2 (Statement of Work). Prices shall include all components normally included in providing the proposed services such as professional fees, support expenses and travel expenses (should the context permit), etc. All prices must include a detailed breakdown and include at a minimum the following: <ul style="list-style-type: none"> i. all inclusive daily rate applicable to proposed personnel who will do the work; ii. estimated total number of billable days to do the work;
d. The Proponent shall propose an alternative invoicing schedule if the following schedule isn't suitable: <ul style="list-style-type: none"> • 20% of fees upon approval of the inception report/workplan;

- 25% of fees upon approval of the year 1 report, with any incurred expenses;
- 25% of fees upon approval of the year 2 report, with any incurred expenses;
- 30% of fees upon approval of the final report, with any remaining incurred expenses.

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

e. Proponents who must travel to IDRC's regional offices 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, September 3, 2021, at 11:00 a.m. EDT** in order to receive a response prior to the close date. When submitting, Proponents’ email subject line should cite **“RFP # 21220005 - Monitoring, Evaluation and Learning Assignment for the AI4D Africa Initiative”**.

The RFP Authority will provide to Proponents all answers to significant enquiries received without revealing the sources of the enquiries. The consolidated anonymized questions and answers will also be posted online on the funding opportunity page at <https://africa.ai4d.ai/calls/mel-services>.

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 posted on the funding opportunity page.

Applicants are invited to monitor closely <https://africa.ai4d.ai/calls/mel-services> for amendments, updates and FAQs regarding the call.

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 # 21220005 - Monitoring, Evaluation and Learning Assignment for the AI4D Africa Initiative”** 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

Below is the proposed sample Contract and Terms and Conditions (reference section 5.9).

Specific Terms and Conditions of the Contract

CONTRACT NO. _____

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

The parties agree as follows:

1. TERMS OF REFERENCE AND SCHEDULE

1.1 Summary

1.2 Scope

1.3 Schedule

1.4 Contract Resources

The following individuals are the main contacts for this Contract:

1.4.1 IDRC will be represented by:

1.4.2 The **Consultant** will be represented by:

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

1.5 Service Location

1.6 Service Engagement Process

1.7 Change Management

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

2. FEES

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

3. TRAVEL AND TRAVEL EXPENSES

4. INVOICES

4.1 Invoice Schedule

The Consultant shall invoice IDRC according to the following schedule:

4.2 Invoice Submission Instructions

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

Invoices must be set out as follows:

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

5. PAYMENTS

5.1 Payment Inquiries

Payment inquiries should be sent electronically to:

ap-cc@idrc.ca

5.2 Payment Method

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

5.3 Advance Payments

IDRC will make no advance on fees and travel expenses.

5.4 Conditions Precedent for Payment

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

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

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

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

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

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

6. SPECIAL CONTRACT CONDITIONS

7. CONTRACT DOCUMENTS

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

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

8. CONTRACT ACCEPTANCE AND SIGNATURES

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

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

CONSULTANT

By: _____
Signed

Printed Name

Title

Date

IDRC

By: _____
Signed

Printed Name

Title

Date

Attach:

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

ATTACHMENT A - General Terms and Conditions of the Contract

A1. DEFINITIONS

For the purposes of this Contract:

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

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

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

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

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

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

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

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

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

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

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

A2. TIME OF ESSENCE

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

A3. ENTIRE AGREEMENT

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

A4. NON-EXCLUSIVITY

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

A5. WARRANTY

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

A6. TAXES

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

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

A7. INVOICES

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

A8. PAYMENTS

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

A9. TERMINATION

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

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

Termination without Cause: IDRC may at any time by notice in writing suspend the work of the Consultant or any part thereof. This Contract may be terminated in its entirety or in part by IDRC upon written notice. On such termination or suspension, the Consultant shall have no claim for damages, compensation, or loss of profit against IDRC except payment for Services performed and Deliverables submitted up to the date of notice of such suspension or termination, or completed thereafter in accordance with the notice.

A10. INSURANCE

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

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

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

A11. USE OF IDRC PROPERTY

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

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

A12. SUB-CONTRACTORS, SUCCESSORS AND ASSIGNEES

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

A13. RELATIONSHIP WITH IDRC

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

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

A14. CONFIDENTIALITY OF INFORMATION

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

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

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

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

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

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

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

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

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

This section shall survive the termination of this Contract.

A15. ASSIGNMENT OF COPYRIGHT AND WAIVER OF MORAL RIGHTS

In consideration of the fees paid, the Consultant, its employees, subcontractors, successors and assignees expressly agree to assign to IDRC any copyright arising from the Deliverables. The Consultant hereby agrees to waive in favour of IDRC any moral rights in the Deliverables. The Consultant shall secure any additional waivers of moral rights in the works in favour of IDRC, from personnel and subcontractors, as appropriate.

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

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

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

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

This section will survive termination of the Contract.

A17. CONFLICT OF INTEREST

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

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

A18. COMPLIANCE WITH LAWS

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

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

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

A19. GOVERNING LAW

This Contract shall be governed and construed in accordance with the laws of the Province of Ontario, Canada. Where a dispute cannot be resolved by mutual agreement, the parties agree that any legal action or claim must be brought before the courts of the Province of Ontario, Canada, which will have exclusive jurisdiction over all such actions and claims.

A20. SEVERABILITY

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

A21. WAIVER

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

A22. FORCE MAJEURE

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

A23. NOTICES

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

Any notice so sent shall be deemed received as follows: 1. if hand delivered, on delivery, 2. if by commercial courier, on delivery, 3. if by registered mail, three (3) business days after so mailing, or, 4. if by facsimile or electronic-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** 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

IDRC's designated travel agency will not advise the Consultant of the availability of **insurances** unless specifically requested by the Consultant at the time of booking travel. Any insurance acquired by the Consultant from IDRC's designated travel agency shall be at the expense of the Consultant.

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

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

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

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

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

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

B1.5 Air/Rail Travel Booking Process

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.

B1.6 Hotel

The Consultant pays the hotels directly.

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.

ANNEX B – Mandatory Requirements Checklist

INSTRUCTIONS:

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

PART 1: *General Mandatory Requirements of this RFP*

These general Mandatory Requirements will be confirmed by IDRC:

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

PART 2: *Statement of Work Mandatory Requirements*

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

Example:

#	Mandatory Requirements	Compliant (yes or no)	Response
	RESOURCES		
M1.	Lead Resource must be bilingual.	yes	See page 3, heading "xxxxx", paragraph 3 and 4.

Mandatory Requirements in Response to the Statement of Work:

#	Mandatory Requirements	Compliant (yes or no)	Response
	COMPANY		
M1.	<p>Company - Executive Summary</p> <p>The Proponent shall include a short executive summary of maximum one (1) single-spaced page highlighting the following:</p> <p>a. a description of the consulting firm (if applicable) outlining:</p> <ul style="list-style-type: none"> • the Proponent's business and specializations • the location of its head office and other offices (specify city and province only) • details of any sub-contracting arrangements to be proposed 		
	RESOURCES		
M2.	All Proposed Resources - Outline		

	The Proponent shall outline <i>all proposed resources</i> to be used in completing the contract and provide a brief overview of the proposed team composition, their roles and responsibilities.		
M3.	All Proposed Resources - Bios The Proponent shall include an up-to-date bio of <i>each proposed resource</i> .		
TECHNICAL PROPOSAL			
M4.	Proposed evaluation approach – Outline The Proponent shall include a brief outline of the proposed evaluation approach.		
M5.	Planned activities – Outline The Proponent shall describe activities the evaluation team will undertake during the inception phase, and a general workplan for subsequent years.		

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 "xxx", section 1.1

RATED REQUIREMENTS:

Rated Requirements in Response to the Statement of Work:

#	Rated Requirements	Weight	Response
	TEAM COMPOSITION AND EXPERTISE		
R1.	<p>Demonstrate Similar Services Provide a minimum of one, and a maximum of three examples of similar services delivered in the past.</p> <ul style="list-style-type: none"> For each experience, provide a description of the services provided, the total budget amount, how the information was used by the commissioner of the study/M&E work products, and a rationale for how this experience adequately prepares the evaluation team to deliver successfully on the scope of work outlined in this RFP. Provide the name and contact information for the applicants' main point of contact for the client associated with each experience selected. 	10	
R2.	<p>Team Requirements Experienced consulting firm or group of experts should have the following competencies and expertise:</p> <ul style="list-style-type: none"> Participatory evaluation methodologies; Adaptive management approaches for continued learning and engagement; Cross-cultural facilitation skills in both English and French; Track record of M&E services in relevant thematic areas such as research for development, artificial intelligence for development, digital technologies, gender equality and diversity/inclusion; Adult education, advisory/coaching experience and facilitation principles and practices; Strong knowledge of and work experience in different African contexts (including francophone Africa); Strong interpersonal and communication skills; and Gender balance among the MEL team. 	20	

	Applicants shall include a description of everyone's roles and responsibilities with respect to the services requested in this RFP. CVs for all team members should be put in annex.		
R3.	Diversity and inclusion Describe the extent to which the composition of the evaluation team reflects a balance in gender and other types of diversity and inclusion. This includes representation from francophone Africa, including French language skills. Please also provide a brief description of how the individual/team is uniquely qualified to perform MEL work in different African contexts (including francophone Africa).	10	
	TECHNICAL PROPOSAL		
R4.	Approach and Methodology – Technical merit The technical proposal must describe the proposed evaluation approach in up to five (5) single-spaced pages. <ul style="list-style-type: none"> • The technical proposal should include a description of: • The applicant's understanding of the assignment at hand; • A brief outline of the proposed evaluation approach and design that may be suitable with an associated rationale; • Activities the evaluation team will undertake during the inception phase; • Draft workplan and timeline – with details for the first year, and a general approach for subsequent years. <p>Applicants will be scored based upon the quality and thoughtfulness of the evaluation approach they present in the technical proposal. Particular attention will be paid to the extent to which the proposed approach aligns with the needs reflected in this RFP, including those of the information needs of the primary intended users.</p>	30	
R5.	Feasibility of the proposed approach Applicants should describe potential challenges the evaluation team may encounter in carrying out the scope of work and a strategy for addressing and minimizing the risks associated with these challenges. Reviewers will assess the extent to which the proposed approach including the draft workplan and timeline are feasible given the funding amount and time provided.	15	
	PRESENTATION AND QUALITY OF PROPOSAL		
R6.	Overall presentation of the proposal will be assessed: <ul style="list-style-type: none"> • Clarity and conciseness throughout the sections • Clear plain language (either French or English) 	10	
	FINANCIAL PROPOSAL		
R7.	Applicants shall specify the total pricing for these services, exclusive of taxes. The Proponent submitting the lowest price will receive the maximum points. All other Proponents will receive a prorated score based on the relative proportion of their price to the lowest price submitted. The final proposal should be submitted as a separate file.	5	