

REQUEST FOR PROPOSAL (“RFP”)

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| RFP #: 21220004 | RFP Title: Mid-term Evaluation Knowledge and Information Exchange (KIX) |
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SECTION 1 – INTRODUCTION

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

1.1 IDRC OVERVIEW

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

1.2 PURPOSE OF THIS RFP

IDRC requests proposals for a team to conduct a mid-term evaluation of the Global Partnership for Education’s (GPE) Knowledge and Information Exchange (KIX) 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
- ATTACHMENTA- KIX IMPACT PATHWAY
- ATTACHMENTB-

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 | September 2021 |

SECTION 2 – STATEMENT OF WORK

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

2.1 INTRODUCTION AND PROJECT OVERVIEW

The Global Partnership for Education (GPE) Knowledge and Innovation Exchange (KIX) is a joint endeavor between GPE and the International Development Research Centre (IDRC) to connect expertise, innovation, and knowledge to help developing countries build stronger education systems and accelerate progress toward SDG 4. Launched in 2019 and with a total budget of CA\$103 million, KIX is the largest fund solely dedicated to bridging the knowledge gaps that undermine education systems in developing countries. The current duration of KIX is five years (2019-2024).

An overall objective of KIX is to strengthen national education systems and accelerate educational progress in GPE member countries by filling knowledge gaps, increasing access to evidence, and strengthening systems to support the generation and uptake of evidence and innovations in these countries. KIX is designed to be shaped by the demand from national education systems and respond to their principal policy and programming challenges. It works towards achieving this objective through two of its mechanisms—knowledge exchange and applied research projects.

- A purpose of **knowledge exchange**—which is facilitated by four regional hubs—is to create space for GPE partner countries to share information, innovation, and best practices among themselves with respect to their needs and priorities, as well as disseminate knowledge generated through KIX funded projects. Each country is invited to nominate up to five educational stakeholders—three from the government and two from the local education group to be a national delegation in hub activities. Members of national delegations act as conduits between hubs and countries. They are tasked with feeding in their national priorities, perspectives and experiences into the hub and mobilize their learning from the hub back into policy and practice in their countries. In addition to members of national delegations, other educational stakeholders from countries attend hub meetings and activities that are open to a broader public. Hubs work to contribute to strengthening education systems of GPE partner countries by:
 - Fostering demand-driven regional knowledge exchange and strengthening the capacity of hub members to identify, use, share, and mobilize evidence related to priority policy challenges.
 - Producing relevant knowledge and evidence syntheses and disseminating to relevant actors.
 - Mobilizing regional knowledge and evidence uptake.
- A purpose of the **applied research projects** is to conduct research in support of scaling the impact of innovations that address education priorities of GPE partner countries. It also seeks to fill in the knowledge gap in key priority areas by surfacing new knowledge and documenting as well as analyzing promising innovations and practices. In so doing, it aims at effectively bringing innovations to scale while maintaining the quality, equity, efficiency, and sustainability of their impacts. The applied research projects are represented by 12

global and 22 regional grant projects launched in 2020 and 2021, respectively. The projects work to contribute to strengthening education systems of GPE partner countries by:

- Producing high-quality, applied and contextually relevant research to support the adaptation and scaling of innovations to address key education priorities in GPE partner countries.
- Strengthening the capacity of educational stakeholders involved in research to use innovations.
- Effectively mobilizing research evidence produced in countries to support the scaling of innovations.

KIX has engaged in several activities to support the two key mechanisms above. Specifically, KIX started the [Research on Scaling the Impact of Innovations in Education \(ROSIE\)](#) project, the purpose of which is to support scaling efforts of global and regional grant projects through action research and generate new knowledge about the scaling of education innovations in low- and middle-income contexts. KIX has developed a results framework to monitor, evaluate, and learn from these KIX mechanisms. As part of this effort, the team has developed a KIX impact pathway that describes the key activities and envisioned outcomes of KIX (see Annex A). KIX has created a communications and knowledge mobilization strategy to enhance the visibility of the work KIX does, share the evidence that emerges, and encourage research uptake by key decision-makers in the education sector. Lastly, in response to the COVID-19 pandemic, KIX has established the [Observatory on COVID-19 Responses in Educational Systems in Africa](#). The purpose of the Observatory is to collect, synthesize and mobilize information about COVID-19 responses in primary and secondary education to inform policy and practice in GPE partner countries in Africa.

2.1.1 Overview of the Evaluation

2.1.1.1 Evaluation Purpose

The primary purposes of the current evaluation are to provide:

1. Rigorous, credible, and useful information that will be considered by the GPE and IDRC Boards in upcoming decisions regarding re-financing KIX,
2. Relevant and trustworthy insights to the KIX Executive Committee to make decisions about the strategic direction of KIX, and
3. Accurate, relevant, and actionable insights to KIX implementation staff (at the GPE Secretariat and IDRC), Regional Learning Partners, and National Delegations that they can use to improve current implementation efforts of KIX and inform any future adaptations, especially, links to system transformation and partnership compacts.

2.1.1.2 Focus of the Evaluation

To fulfill the evaluation purposes, we envision the evaluators will pursue the following lines of inquiry. In this section we provide some specific evaluation questions that might be examined under each line of inquiry. We encourage applicants to also review Attachments A and B to obtain additional details about considerations in forming criteria of merit that align with these example questions (where applicable). The example evaluation questions, and criteria considerations, are intended to provide the applicants with a sense of the breadth and depth of inquiry

anticipated as part of the evaluation. The evaluation team selected will need to further refine and prioritize these items during the inception phase in consultation with primary intended users.

Line of Inquiry 1: Positioning for impact

As seen in the impact pathway provided in Attachment A, KIX is designed to support GPE member countries through several mechanisms including filling knowledge gaps, increasing access to evidence, and strengthening systems to support the generation and uptake of evidence and innovations. It is through the effective implementation of these processes that better evidence-informed policy and practice in national educational systems is enabled. Given that KIX is early in its implementation efforts, and these efforts have taken place during turbulent times, the line of questioning in this evaluation should focus on the ways in which KIX has positioned itself well (or not) to foster the changes envisioned. The following lines of questioning will be important in evaluating the extent to which KIX is well-positioned to foster these intended changes.

- To foster meaningful change country partners must find value in KIX's efforts...
 - To what extent is KIX addressing priorities that are noted as being relevant to country partners?
 - To what extent, and in what ways, do country partners find KIX useful?
- Meaningful change also will require that KIX has effectively positioned its knowledge exchange and research for use...
 - To what extent are national delegations positioned to function as effective links between the hubs and country level policy dialogue? What has been accomplished so far? How can these links be strengthened further?
 - To what extent, and in what ways, have projects developed strategies to support the scaling of impact and knowledge mobilization?
- The extent to which KIX efforts already align with the priorities articulated in GPE and IDRC's newly approved strategies (GPE 2025 and Strategy 2030) is important to consider in examining how current day efforts are/are not positioned in the new landscape¹...
 - In what ways are KIX efforts already aligned with the new landscape articulated in GPE and IDRC's newly approved strategies? What is missing that, if addressed, could bring current-day efforts into closer alignment with these future directions?
 - In what ways are current KIX efforts considering gender equality, equity, and inclusion? How are they embedding these considerations in practice? What opportunities exist for strengthening these efforts?
- Examining early indications of progress...
 - To what extent and in what ways has KIX started to contribute to the immediate outcomes articulated in the KIX outcome pathway?

¹ KIX was conceptualized, approved, and initiated under previous strategy periods for both GPE and IDRC. As GPE transitions from GPE2020 to GPE2025 and their new Operating Model (strategic plan that is active from January 2021) and IDRC begins implementing its Strategy 2030 it is important to understand how KIX already aligns and what changes may be useful.

Line of Inquiry 2: Lessons learned from implementation to date

KIX is early in its implementation efforts. This evaluation provides an opportunity to better understand what is and is not working well with respect to implementation; these insights can be used to adjust KIX now and in the future.

- How well has KIX been implemented and adaptively managed? To what extent has KIX been able to pivot effectively in light of changes in context and needs, especially with respect to the COVID-19 pandemic?
- Is KIX being run in an efficient manner (focusing on the sphere of control)? If yes, in what ways? If no, what areas need improvement?
- How well is the governance of KIX working to date, in particular the GPE Secretariat-IDRC collaboration? What strengths can be built upon? What needs improvement?

Synthesis: Recommendations for current and future implementation

In addition to providing responses to the two lines of inquiry articulated above, the evaluation team is expected to synthesize findings to provide insights about what KIX has accomplished to date, how well KIX aligns with future directions, and what may need to change going forward. This final synthesis and all responses to the lines of inquiry previously mentioned should be strongly rooted in the triangulation of data that includes diverse voices and values.

2.1.1.3 Primary Intended Users and Uses

There are four primary intended users for this evaluation. These stakeholder groups are those that intend to take direct action on the findings provided through this evaluation as described in the table below.

| Primary Intended Users | Anticipated Uses |
|---|---|
| GPE and IDRC Boards | To inform KIX re-financing decisions |
| KIX Executive Committee | To adjust the strategic direction of KIX |
| KIX implementation staff (GPE Secretariat and IDRC) | To improve current implementation efforts of KIX and inform any future adaptations, especially, links to system transformation and partnership compacts |
| Regional Learning Partners and National Delegations | To improve current implementation efforts of KIX and inform any future adaptations, especially, links to system transformation and partnership compacts |

There are other stakeholder groups who may have an interest in the findings from this evaluation. These groups represent important *audiences* for the evaluation and include, but are not necessarily limited to: the GPE Secretariat management team, IDRC senior management, KIX funded research projects, and the KIX reference group. The selected evaluation team is expected to understand and prioritize the learning needs of ***primary intended users*** in this evaluation.

2.1.1.4 Evaluation Approach

The evaluation will follow the principles of Utilization-Focused Evaluation. As such, the emphasis is on providing evaluative insights that are useful and credible to the primary intended users (GPE Board, KIX Executive Committee, KIX implementation staff, and Regional Learning Partners and National Delegations) in a timely manner. Though all primary intended users of this evaluation are interested in the lines of inquiry and synthesis presented under “focus of the evaluation”, their information needs differ based upon how they plan to use the evaluative insights. For instance, KIX implementation staff, Regional Learning Partners and National Delegations will require specific details about why and how certain activities are (or are not) successful so they have a sufficient level of detail available to decide what implementation strategies to retain, expand upon, adjust, or cancel. Select examples from the field may be helpful to include to emphasize how the results are manifesting in practice. The KIX Executive Committee requires detailed enough insights to generate ideas for adjusting KIX’s strategic direction in light of the respective organizations’ new strategies (i.e., the GPE’s 2025 strategy and operating model and the IDRC’s Strategy 2030). The respective boards of GPE and IDRC will require summary measures of KIX performance, likely accompanied by a few examples highlighting how this performance has manifested in context. Given these diverse roles, it is critical that the selected evaluation team: (1) Understands, in detail the specific information needs of *each* primary intended user, (2) Translates these information needs into an evaluation design that produces relevant insights for each primary intended user; and (3) Tailors the communication products of the evaluation to the specific information needs of each primary intended user.

2.1.1.5 Evaluation Principles

The evaluation procedures employed by the selected team will be expected to uphold the following evaluation principles:

- The evaluation team should be **independent and impartial**. To ensure this is the case, we expect all applicants will carefully review the conflicts of interest described under “mandatory requirements” and will answer honestly and truthfully. In addition, the selected proponent will be managed and report directly to the Evaluation Team at IDRC, not the KIX program.
- The evaluation produced will be **credible** to the primary intended users. Relevant questions will be addressed with expertise, objectivity, transparency, and rigorous methodology given the available resources. Evaluation designs proposed and implemented will align with those viewed as scientifically rigorous within the evaluation discipline.
- The evaluation procedures and practices will be **transparent**. Evaluation plans will be clearly documented, changes to the evaluation plan throughout implementation will be tracked and documented, perceived strengths and limitations of the design and implementation

- will clearly be documented in the final products, and quantitative evaluation data will be anonymized and made available to the public upon request (with required data protection protocols in place).
- The evaluation will be **useful** for the primary intended users. To this end, the evaluation will be both relevant to this audience and will be delivered in a timely manner to support decision-making, accountability, and learning.
 - The evaluation will be performed in a manner that upholds the **highest ethical principles**. All evaluation team members must be trained in ethical safeguarding of human subjects. Informed consent will be obtained from all participants providing data for this evaluation and will be notified that participation is voluntary and that they may withdraw their consent at any time without negative consequences. Confidentiality and privacy will be maintained for all individuals and clear procedures for ensuring this will be the case will be articulated in the evaluation plan. The evaluation plan must also assess any potential harms to participants or their communities that may arise from participating in this evaluation and propose reasonable mitigation strategies. Respect for cultural sensitivities and human rights should be integrated into all stages and types of evaluation and evaluation-related country-level protocols must be followed as part of designing and implementing the evaluation.
 - The evaluation team should **ensure participation from beneficiaries** where this aligns with the evaluation questions of interest. Diverse views and experiences should be captured through the data collected for the evaluation, as such the evaluators should strive to obtain relevant feedback from country level stakeholders and civil society involved in KIX when applicable.
 - The evaluation team must ensure that the evaluation addresses **gender equality and inclusion**. GPE and IDRC are committed to gender equality, equity, and inclusion and these principles must be upheld in the evaluation approach. To do so, the evaluation team composition should reflect these principles and the evaluation must examine whether and how the work performed within KIX support or otherwise affect gender equality, equity, and inclusion. To uphold this principle, the evaluation team should also perform analyses that disaggregate by gender/other groups to the extent possible.

Applicants should review [Evaluation at IDRC](#) and [GPE's Evaluation Policy](#) for more information about these, and other, relevant principles.

2.2 DESCRIPTION AND SCOPE OF WORK

2.2.1 Project Scope

In Scope:

The majority of this evaluation will be performed between September 2021 and April 1, 2022. The evaluation team will engage in an inception phase in which they will clarify, refine and prioritize the example evaluation questions articulated in section 2.1.1.2 (under the two lines of inquiry). They will then use these insights to produce an evaluation plan that includes a proposed design for the evaluation documenting data collection strategies, analytic approaches, techniques for interpreting and synthesizing findings, and a plan for learning/dissemination. Given the timeline for this evaluation, it is critical that the evaluators engage in processes to clearly define terms included in the evaluation questions and establish criteria of merit (where appropriate).

It is anticipated that the evaluation team will gather primary data for this evaluation, however, it is expected that the team will draw upon the rich data sources already available through KIX's ongoing Monitoring, Evaluation, and Learning (MEL) efforts. KIX draws on outcome mapping and outcome harvesting approaches and tools for its MEL. You can learn more about KIX MEL approaches by watching this short video, which further explains conceptual underpinnings of the KIX MEL system: <https://youtu.be/pl6c7JIWB0I>

In addition to primary data collection, the evaluation team will have access to the following data sources to design and perform the evaluation:

- Program documentation
 - IDRC's KIX proposal to GPE
 - IDRC's annual reports to GPE
 - Documents provided by the KIX Implementation Team to the KIX Executive Committee for approval of funding decisions
 - Record of decisions by the KIX Executive Committee
 - Presentations and communications products
 - KIX MEL strategy (including theory of change, results framework, and learning strategy)
 - KIX communications plans and strategies
 - Calls for proposals documents
 - Manual for the Independent Assessment Panel
 - After-action review documents
 - Needs assessment for the GEI strategy, GEI strategy and accompanying resources
 - KIX website (www.gpekix.org)
- KIX program-wide monitoring data
 - Event, output, request and uptake logs
 - Progress marker journal entries
 - Outcome cases
 - Country representative register
 - Country engagement and ownership rubric
 - ROSIE grantee engagement rubric
 - Research quality+ (RQ+) rubric
 - Grantee annual/interim technical reports
 - MEL quarterly and annual reports
 - Analytics data from KIX Online Systems (Google Analytics, social media analytics, and Mailchimp analytics)

- KIX regional learning partners
 - Proposals and interim reports
 - Hub outputs
 - Annual country representative pulse survey
 - Post-event surveys
 - Program documentation
- KIX-funded projects
 - Proposals, interim reports, and MEL information
 - Initial outputs

2.2.2 Key Activities and Deliverables

An estimated timeline of key activities is provided in the table below with associated deliverables. Applicants may suggest a revised schedule to align with their proposed strategy. However, all proposed activities due on or before April 1, 2022 under section 2.2.3 (timeline) **must** be completed by April 1, 2022. This end date cannot be extended due to timelines associated with key decision-points for the primary intended users.

The evaluation team will be expected to engage virtually with an Evaluation Steering Committee (ESC) at key points during the project lifecycle. The ESC includes representation from the KIX implementation staff (GPE and IDRC), the KIX Executive Committee, and GPE's Results and Performance group.

Four final deliverables are expected under this contract:

| Deliverable* | Intended recipient |
|---|--|
| 1. Written evaluation plan | Evaluation Steering Committee |
| 2. Final written evaluation report | KIX implementation staff Regional Learning Partners & National Delegations KIX Executive Committee |
| 3. Presentation of findings from the evaluation | Evaluation Steering Committee, GPE's Performance Impact and Learning Committee, GPE Board |

4. Executive summary with findings relevant to refinancing decisions GPE's Performance Impact and Learning Committee
IDRC Senior Management
-

*All deliverables provided to the GPE Performance Impact and Learning Committee and GPE Board need to be provided in English and French. IDRC will translate these deliverables into French.

2.2.3 Timeline

| Timeline | Activity and Deliverables |
|----------------------------------|---|
| <i>Sept 2021</i> | Contracting and commencement of services |
| <i>Sept - mid-Oct 2021</i> | <i>Inception phase</i> |
| <i>Early-Oct 2021</i> | Presentation of draft evaluation design plan to Evaluation Steering Committee and GPE's Performance Impact and Learning Committee |
| <i>Mid-Oct 2021</i> | Deliverable: Final evaluation design plan |
| <i>Mid-Oct 2021 – April 2022</i> | <i>Implementation</i> |
| <i>Nov 2021 – Jan 2022</i> | Data collection and analysis |
| <i>Feb 2022</i> | Synthesis and interpretation of findings, draft communication products |
| <i>Mid-Feb 2022</i> | Presentation of preliminary findings to Evaluation Steering Committee, GPE and IDRC senior management |
| <i>Mar-Apr 2022</i> | Draft and finalize communication products (i.e., report, executive summary, presentation) |
| <i>Mar 1, 2022</i> | Draft report, executive summary, and presentation available for review |
| <i>Apr 2022</i> | Presentation to GPE's Performance Impact and Learning Committee Deliverables: Executive Summary and presentation |
| <i>June 2022</i> | Presentation to GPE Board Deliverables: Final report, revised presentation |

2.4.5 Project Budget

Estimated Budget for this Contract is expected to be between 150,000 to 200,000 CAD including all fees.

2.3 IDRC RESPONSIBILITES, SUPPORT, AND REPRESENTATIVES

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

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

2.4 LOCATION OF WORK AND TRAVEL

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

Travel is not expected to be required by the Proponent.

2.5 PERIOD OF A RESULTING CONTRACT

A resulting Contract is expected to commence on September 2021 and conclude in June 2022.

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 | Team section | 45 | | |
| " | Methodology section | 40 | | |
| Total % | | 85 | | |

***Points Table:**

| Points | Points Description |
|--------|--------------------|
| | |

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

3.2.3 Step 3 – Interviews and Clarification Meeting

Proponents may be asked to provide additional information prior to the final selection. IDRC reserves the right to supply more information to those Proponents. This will be in the form of an interview to be scheduled with selected proponents based on the scores of rated requirements in 3.2.2 Step 2- Rated Requirements. The interview will be weighted at 10% and be added to the final evaluation score, only those proponents who score higher than 42.5% on the rated requirements (total possible is 85%) will be considered for interviews. Proponents will be notified by email and interview questions will be provided prior to the meeting.

| RFP Section | Rated Requirements | Weighting A | Points 0-10 B | Score A x B |
|--------------|--------------------|-------------|---------------|-------------|
| 3.2.3 | Interview | 10 | | |
| | Total % | 10 | | |

3.2.4 Step 4 - Financials

Proponents' Financial Proposals will be scored as follows. 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. The evaluation team will also review the financial proposals based on the billable hours, daily rate vs total price and those proposals determined to be best overall value will receive an additional point.

| RFP Section | Rated Requirements | Weighting A | Points 0-10 B | Score A x B |
|-------------|-----------------------------------|-------------|---------------|-------------|
| 4.6 | Total pricing, exclusive of taxes | 4 | | |
| | Overall Value | 1 | | |
| | Total % | 5 | | |

3.2.5. Step 4 - Final Score

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

3.3 PROPOSER 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 PROPOSER 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 in **Annex A**;
- b. Include a **Summary of Qualifications**: Provide a narrative description (up to 7 single-spaced pages) that includes the following elements.
 - **Team composition and expertise**
 - a. IDRC and GPE value diversity and inclusion. The evaluation team composition should reflect these values, at a minimum, by ensuring gender balance. Representation from GPE member countries is viewed as an asset. The proponent should explain how their team reflects these values.
 - b. Provide a description of the experience and expertise that each member of the team brings to this project. This should include the team members' level of (1) experience evaluating research for development particularly in educational contexts, (2) understanding of development contexts, including policy and implementation processes and capacity constraints in low-capacity contexts, (3) understanding of education systems in developing countries, and (4) understanding of/experience with evaluation of multi-country knowledge/research to policy programs, especially in low-capacity environments.
 - c. Include a description of each individual's roles and responsibilities with respect to the services requested in this RFP.

- d. The applicant should provide a resume/CV for all team members as an annex to the proposal. Each resume/CV is limited to no more than 5 pages.
 - **Description of similar experience:**
 - a. Provide a minimum of one, and a maximum of three examples of similar services delivered in the past. These services must have been delivered within the past 7 years.
 - b. 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/evaluation, and a rationale for how this experience adequately prepares the evaluation team to deliver successfully on the scope of work outlined in this RFP.
 - c. Provide the name and contact information for the client associated with each experience selected. This shall include: company name, client contact name, contact title, contact telephone number, email address, and the time period during which services were provided.
 - c. **Evaluation Approach** (up to 7 single-spaced pages)
 - The applicant must clearly outline the work that the evaluation team proposes to undertake for the provision of these Services to IDRC.
 - The evaluation approach should include a description of...
 - The applicant's understanding of the assignment at hand
 - Activities the evaluation team will undertake during the inception phase including strategies for clarifying ambiguous terminology and articulating the parameters that will be used to judge performance and come to evaluative conclusions with respect to the evaluation questions
 - The general content the inception report will include
 - A brief outline of the proposed evaluation approach and design that may be suitable with an associated rationale
 - Draft workplan and timeline
 - A description of 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
 - d. Each **Mandatory Requirement** in Annex A; and
 - e. Each **Rated Requirement** in Annex A.
- The Proponent must clearly outline the work that the Proponent proposes to undertake for the provision of these Services to IDRC.

4.7 FINANCIAL PROPOSAL

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

4.7.1 Financial Requirements

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

Financial Requirements

- a. The Proponent is to state the assumptions underlying its financial proposal.
- 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.

All prices must include a detailed breakdown and include at a minimum the following:

- i. all inclusive daily rate applicable to proposed personnel who will do the work;
- ii. estimated total number of billable days per personnel to do the work;

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

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

4.7.2 Mathematical Errors

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

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

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

SECTION 5 – CONDITIONS

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

5.1 ENQUIRIES

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

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

Proponents should, as much as feasible, aggregate enquiries and requests for clarifications and shall submit them **in writing via email** to the **RFP Authority** by Thursday, July 29, 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 # 21220004** - Mid-term Evaluation Knowledge and Information Exchange (KIX)”.

The RFP Authority will provide **all answers to significant enquiries** received on buyandsell.gc.ca without revealing the sources of the enquiries.

In the event that it becomes necessary to revise any part of the RFP as a result of any enquiry or for any other reason, **an Amendment** to this RFP will be issued and posted on buyandsell.gc.ca

Important note: Proponents must download all RFP documents directly from the Buy and Sell website. IDRC will not distribute RFP documents that are posted on buyandsell.gc.ca.

5.2 SUBMISSION DEADLINE

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

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

5.3 PROPOSAL SUBMISSION INSTRUCTIONS

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

5.3.1 Method of Sending

The preferred method of proposal submission is electronic, via **email**, in **Microsoft Word** or in **PDF** format to the RFP Authority named on page 1. Proponents *email subject line* should cite “**RFP # 21220004** - Mid-term Evaluation Knowledge and Information Exchange (KIX) 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

1. Anti-terrorism and compliance with global sanctions

The Consultant will use reasonable efforts to ensure that Fees are not used for the purpose of any payment to persons or entities, or for the import of good, if such payment or import, to the Consultant's knowledge or belief, is prohibited by a resolution, action, or decision of the United Nations Security Council taken under Chapter VII of the Charter of the United Nations, and are not diverted to terrorists or their agents.

2. GPE Misuse of GPE Trust Funds Protocol

“Misuse” means any use of fees or other property for the purpose other than for which they were approved and any or all of the following practices:

Corruption: offering, giving, receiving, or soliciting, directly or indirectly, anything of value to influence improperly the actions of another party.

Fraud: any act or omission, including the misrepresentation, that knowingly or recklessly misleads, or attempts to mislead, a party to obtain a financial or other benefit or to avoid an obligation.

Coercion: impairing or harming, or threatening to impair or harm, directly or indirectly, any party or the property of the party to influence improperly the actions of a party.

Collusion: an arrangement between two or more parties designed to achieve an improper purpose, including influencing improperly the actions of another party.

Obstruction: deliberately destroying, falsifying, altering or concealing of evidence material to the investigation or making false statements to investigators in order to materially impede an investigation.

The Centre is obligated to follow the Global Partnership for Education (“GPE”) Policy and Communications Protocol on Misuse of GPE Trust Funds as amended from time to time (the “Protocol”). Accordingly, and notwithstanding section 14 of this Agreement “Confidentiality of Information”, the Consultant:

agrees that the Centre is authorized to communicate any credible allegations of Misuse to the Secretariat and/or Board of the GPE, the developing country government in which the Work is taking place, and any donors active within that country;

understands and acknowledges that the Centre takes no responsibility for how the third parties to whom this disclosure is made use or further disclose the information;

acknowledges that the Board of the GPE may issue a public statement about the Misuse and that such decision is within the discretion of the Board of the GPE.

7. CONTRACT DOCUMENTS

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

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

8. CONTRACT ACCEPTANCE AND SIGNATURES

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

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

CONSULTANT

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** –
- 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.

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 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 "xxxx", paragraph 3 and 4. |

Mandatory Requirements in Response to the Statement of Work:

| # | Mandatory Requirements | Compliant (yes or no) | Response |
|------------------|---|--------------------------|----------|
| Team | | | |
| RESOURCES | | | |
| M1. | All Proposed Resources - Outline The Proponent shall outline <i>all proposed resources</i> ("delivery of services personnel" and other resources) to be used in completing the project and include: | | |

| | | | |
|------------|--|--|--|
| | a. their roles , structure and reporting relationships b. name, title, telephone #, email address, location (city and province only*) | | |
| M2. | All Proposed Resources - CV The Proponent shall include an up-to-date cv/resume of <i>each proposed resource</i> (no more than 5 pages per CV/resume). | | |
| M3. | Statement assuring no real or perceived conflicts of interest. Criteria for excluding certain individuals/organizations from undertaking the evaluation based on conflict of interest could include: 1) having been involved in the design, implementation, or oversight of the activities within the project or program being evaluated; 2) expectation of applying for funding from the organization/program for the duration of the evaluation; and 3) having a stake in what the evaluation uncovers. | | |
| M4. | Full capacities in English and French (the working language of the project will be English, but some data collection will be required in French). | | |

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:

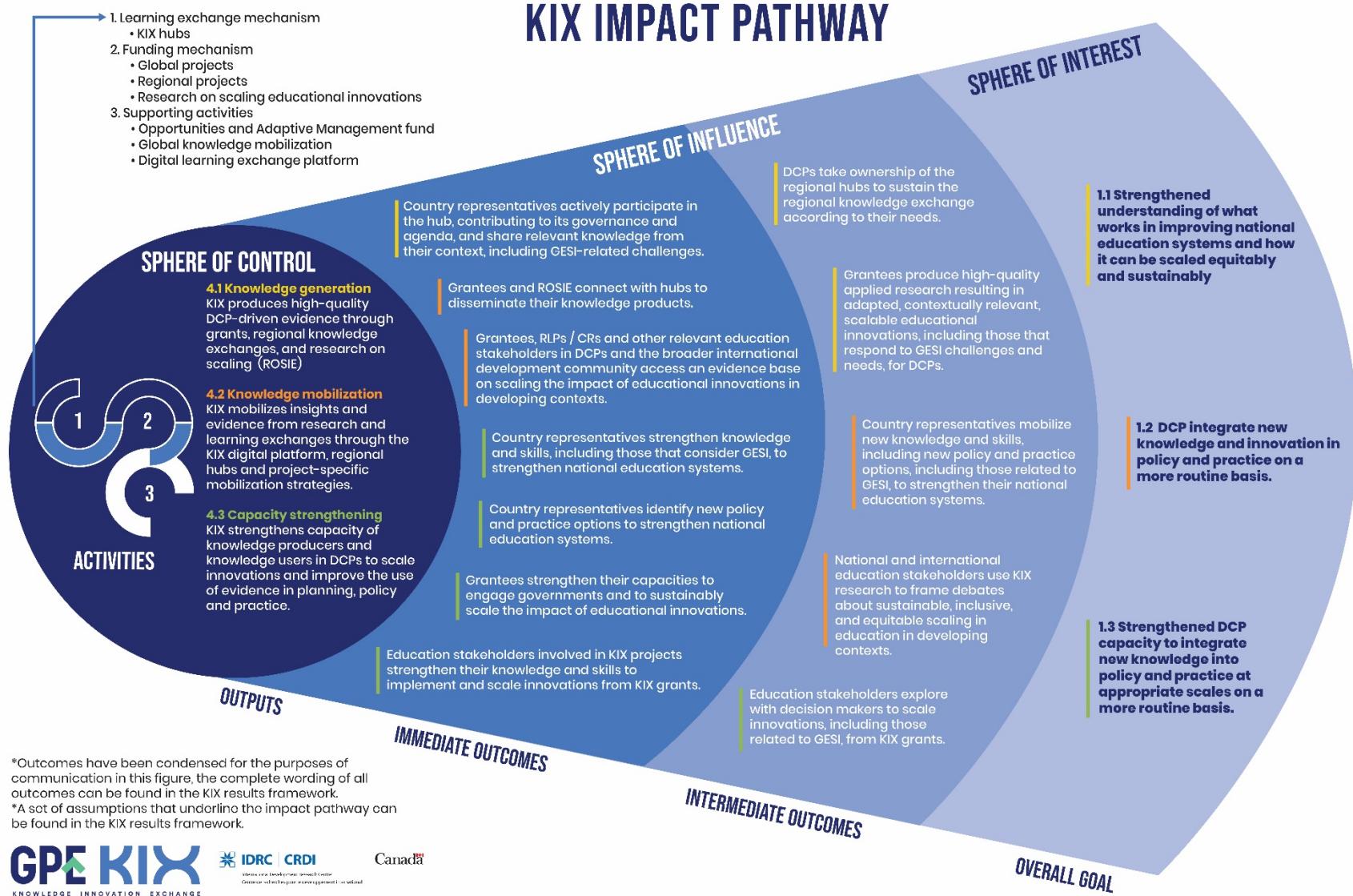
Rated Requirements in Response to the Statement of Work:

| # | Rated Requirements | Weight | Response |
|-----|---|-----------|----------|
| | TEAM | 40 | |
| R1. | Team expertise Proponents will be scored on the extent to which the team clearly demonstrates a depth of understanding, experience, and expertise in domains that are required to produce a high-quality evaluation: (1) experience evaluating research for development particularly in educational contexts, (2) understanding of development contexts, including policy and implementation processes and capacity constraints in low-capacity contexts, (3) understanding of education systems in developing countries, and (4) understanding of/experience with evaluation of multi-country knowledge/research to policy programs, especially in low-capacity environments. This score will also account for any proposed subcontracting arrangements including the roles, responsibilities, and relevant experience for each subcontracted entity. In the event such experience is not already covered by core team members, potential beneficial subcontracts may include those acquiring services from an | 25 | |

| | | | |
|--------------------|---|-----------|--|
| | editor, graphic designer, and/or communications specialist to ensure the deliverables are clear and engaging for the intended recipients. | | |
| R2. | Team composition Proponents will be scored on the extent to which the composition of the evaluation team reflects a balance in gender and other types of diversity and inclusion. Representation from GPE member countries will be viewed as an asset. | 5 | |
| R3. | Relevance and quality of previous work Proponents will be scored based upon the examples of prior work provided. Proponents that have engaged in prior work that is similar to that requested under this RFP, for similar types of clients, and with similar stakeholder groups will be rated higher. Quality of work performed based upon references received will weigh strongly in the rating assigned. | 10 | |
| METHODOLOGY | | 45 | |
| R4. | Understanding of IDRC and SOW The Proponent should demonstrate that it has a complete understanding of: a. IDRC and the KIX Program; and b. the objectives and requirements in Annex B – Statement of Work | 5 | |
| R5. | Methodological Rigor Proponents 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 the information needs of the primary intended users. The committee will consider the extent to which the proposal is likely to result in findings that are accurate, credible, trustworthy, useful, and relevant. Omission of items requested in the RFP under “evaluation approach” (section 4.6.2) will result in lower scores. Abilities to conduct proposed data collection activities in languages beyond English and French given the countries involved in KIX will be viewed as an asset. | 25 | |

| | | | |
|-----|---|----|--|
| R6. | Feasibility of Approach Proponents will be scored on the extent to which the proposed approach including the draft workplan and timeline are feasible given the funding amount and project timeframe. | 10 | |
| R7. | Risk Management- Describe any contingencies that may hinder the progress or outcome of the project and suggest how you would mitigate them. | 5 | |

ATTACHMENT A: KIX Impact Pathway



ATTACHMENT B

| Line of Inquiry 1 - Positioning for impact | |
|--|---|
| Example evaluation question | Some considerations in answering the question |
| To what extent is KIX addressing priorities that are noted as being relevant to country partners? | Each regional hub has identified country priorities to prepare for four calls for regional grant projects. A summary report on the priorities for each region can be found on the KIX web pages for each hub: KIX Africa 19 , KIX Africa 21 , KIX EAP , and KIX LAC . |
| To what extent, and in what ways do country partners find KIX useful? | Several ideas regarding what may constitute utility can be found in Annex A – specifically use as it relates to the sphere of control and immediate outcomes. Use should not be restricted to items captured in the impact pathway – unintended use should also be considered. |
| To what extent are national delegations positioned to function as effective links between the hubs and country level policy dialogue? What has been accomplished so far? How can these links be strengthened further? | Considerations here will likely involve elements of program design and early implementation – such as the formation, engagement, and support provided. Examination of this question, as others, should be examined in the context of the COVID pandemic – as early design efforts envisioned such links including in-person components. |
| To what extent, and in what ways, have projects developed strategies to support the scaling of impact and knowledge mobilization? | Given that KIX projects are in the early stage of their activities, it is important to examine the extent to which they are on track in terms of building evidence about adapting their innovations to new contexts, piloting them, and determining appropriate scaling pathways and approaches. It is also important to examine whether and to what extent they have developed their knowledge mobilization strategies to effectively translate their evidence into policy and practice. IDRC's Research Quality Plus quality dimension concerning positioning for use may be helpful in examining knowledge mobilization efforts. |
| To what extent and in what ways has KIX started to contribute to the immediate outcomes articulated in the KIX outcome pathway? | Please refer to Annex A – Impact pathway. |
| In what ways are KIX efforts already aligned with the new landscape articulated in GPE and IDRC's newly approved strategies? What is missing that, if addressed, could bring current-day efforts into closer alignment with these future directions? | As part of examining these questions, the evaluators will need to consider the newly approved strategies: GPE 2025 Strategic Plan and IDRC's Strategy 2030 . |
| In what ways are current KIX efforts considering gender equality, equity, and inclusion? How are they embedding these considerations in practice? What opportunities exist for strengthening these efforts? | Such efforts could be wide-ranging including, but not limited to, the gender balance of projects at implementation as well as how gender equality, equity, and inclusion are addressed within the research process (e.g., study designs, methods, etc.). Additional ideas may stem from reviewing IDRC's Research Quality Plus dimension on research legitimacy. |

| <i>Line of Inquiry 2: Lessons learned from implementation to date</i> | |
|---|--|
| Example evaluation question | Some considerations when developing criteria |
| How well has KIX been implemented and adaptively managed? To what extent has KIX been able to pivot effectively in light of changes in context and needs, especially with respect to the COVID-19 pandemic? | Decisions regarding program implementation are critical in facilitating positive outcomes. KIX has been implemented during an unusual time in history – and this affords us the opportunity to learn about how implementation efforts, and especially, the adaptive management process that is embedded at the project and program levels in KIX did or did not work. In responding to this question, the evaluators might elect to examine more traditional aspects of program implementation such as the extent to which appropriate projects have been selected. However, they also need to consider how COVID affected implementation efforts – including changes in the program and project plans. It may be helpful to consider what implementation modifications are valuable to retain going forward, and once the COVID-19 pandemic resolves. |
| Is KIX being run in an efficient manner? If yes, in what ways? If no, what areas need improvement? | Responses to this question should focus on the sphere of control depicted in Annex A. Considerations might include, but are not limited to, the timeliness of efforts and the extent to which KIX has operated within budget. |
| How well is the governance of KIX working to date, in particular, the GPE Secretariat-IDRC collaboration? What strengths can be built upon? What needs improvement? | Evaluators will need to examine, with the primary intended users, what constitutes a successful collaboration between the GPE Secretariat and IDRC. |