

# BID SOLICITATION

Grand Challenges Canada

MaRS Centre, West Tower, 661 University Avenue, Suite 1720, Toronto, Ontario, Canada M5G 1M1

T 416.583.5821 E info@grandchallenges.ca



Grand Challenges Canada®  
Grands Défis Canada

**BOLD IDEAS WITH BIG IMPACT®**

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## **Bid Solicitation Innovation Portfolio Sensemaking**

**Submission Deadline:  
27 January 2020 – 17:00 ET**

**RFP Reference Number:  
RFP-2020-01-02**

## **Part 1: Introduction**

### **1.1 Grand Challenges Canada’s Objective**

Grand Challenges Canada is seeking assistance with its activities to nurture the scalability and sustainability of global health innovations that Grand Challenges Canada supports.

The objective of this bid solicitation (“Bid Solicitation”) is to select vendor(s) to enter into a contract with Grand Challenges Canada to provide the services described in the Statement of Work, as defined in Appendix A. Appendix B defines the evaluation criteria that will be used during the selection process.

### **1.2 About Grand Challenges Canada**

Grand Challenges Canada is dedicated to supporting Bold Ideas with Big Impact®. Funded by the Government of Canada and other partners, Grand Challenges Canada funds innovators in low- and middle-income countries and Canada. The bold ideas Grand Challenges Canada supports integrate science and technology, social and business innovation – known as Integrated Innovation®.

One of the largest impact-first investors in Canada, and with a feminist investment approach, Grand Challenges Canada has supported a pipeline of over 1200 innovations in more than 85 countries. Grand Challenges Canada estimates that these innovations have the potential to save up to 1.6 million lives and improve up to 51 million lives by 2030.

Grand Challenges Canada is hosted in Toronto at the Sandra Rotman Centre at the University Health Network.

For more information, please see: [www.grandchallenges.ca](http://www.grandchallenges.ca), including our latest Annual Report under “Who We Are”.

## Part 2: Standard Instructions, Clauses and Conditions

### 2.1 Submission of Proposal

- a. Grand Challenges Canada requests that each Bidder submit a bid (“Bid”) by email only, to the email address outlined in Paragraph 2.2, as early as possible, but **no later than the deadline stipulated in Appendix A; see “Deadline For Submission” (the “Closing Date”)**.
- b. The Bid must include the firm’s name, a contact name, address, telephone and fax numbers, and email address.
- c. Grand Challenges Canada requests that each Bid contain a covering letter signed by the Bidder or by an authorized representative of the Bidder. The covering letter should reference the RFP Reference Number, which is included on the cover page of this document. The Bidder’s signature indicates acceptance of the terms and conditions set out and/or referenced herein. The signatory must have authority to commit the organization by making such a proposal. A contract will not be awarded until a signed covering letter from the Bidder is received by Grand Challenges Canada. If the Bidder fails to provide a signed covering letter when requested to do so by Grand Challenges Canada, then the Bidder shall be disqualified from the bidding process and be declared non-compliant.
- d. It is the Bidder's responsibility to:
  - i. Obtain clarification of the requirements contained in the Bid Solicitation, if necessary, prior to submitting a Bid;
  - ii. Prepare its Bid in accordance with the instructions contained in this Bid Solicitation;
  - iii. Submit its Bid by the Closing Date;
  - iv. Send its Bid only to the Contracting Authority named in Paragraph 2.2 below;
  - v. Provide a contact name, address, telephone number and email address in its Bid, as indicated in 1b above; and
  - vi. Provide a comprehensible and sufficiently detailed Bid, including all requested pricing details that will permit a complete evaluation, in accordance with the criteria set out in this Bid Solicitation.
- e. Bids will remain **open for acceptance** for a period of not less than twenty-one (21) calendar days from the Closing Date. Upon notification to the responsive Bidders, Grand Challenges Canada reserves the right in its sole discretion to extend the bid validity period at any time for up to fourteen (14) calendar days.
- f. Bids and/or amendments thereto will only be accepted by Grand Challenges Canada if they are received at the email address indicated below in Paragraph 2.2, on or before the Closing Date specified herein.
- g. Bids received on or before the stipulated Closing Date will become the property of Grand Challenges Canada and will not be returned.

- h. All information within this Bid Solicitation is to be held in confidence.
- i. Grand Challenges Canada will regard and preserve as confidential and proprietary to the disclosing party all information, written, oral or computer-based, to which it has access as part of this Bid Solicitation, except with prior approval of the Bidder.
- j. Except as specifically provided otherwise in this Bid Solicitation, Grand Challenges Canada will evaluate a Bidder's Bid only on the documentation provided as part of its Bid. Grand Challenges Canada will not evaluate information not submitted with the Bid, such as references to website addresses where additional information can be found, or technical manuals or brochures not submitted with the Bid.

## 2.2 Contracting Authority

### Grand Challenges Canada

661 University Avenue, Suite 1720  
MaRS Centre, West Tower  
Toronto, Ontario, M5G 1M1

Attention: Becca Smith, Senior Manager, Knowledge Management and Translation

Telephone: (416) 727-5206

Email: [becca.smith@grandchallenges.ca](mailto:becca.smith@grandchallenges.ca)

**\*Email is preferred for all communications.\***

**\*Bids and amendments will only be accepted by email.\***

## 2.3 Late Bids

- a. The Bidder has sole responsibility for the timely receipt of a Bid by Grand Challenges Canada and cannot transfer this responsibility to Grand Challenges Canada.
- b. Grand Challenges Canada will return Bids delivered after the stipulated Closing Date referred to in **Appendix A**, under "**Deadline for Submission**", unless they qualify as a delayed bid.
- c. A Bid received after the Closing Date but before the contract award date may be considered, provided the delay can be proven by the Bidder to have been due solely to a delay in delivery that can be attributed to incorrect handling by Grand Challenges Canada (a "delayed bid").
- d. Misrouting, traffic volume, weather disturbances, labour disputes or any other causes for the late delivery of Bids are not acceptable reasons for the Bid to be accepted by Grand Challenges Canada.

## 2.4 Legal Capacity

- a. The Bidder must have the legal capacity to contract. If the Bidder is a sole proprietorship, a partnership or a corporate body, the Bidder must provide, if requested

by Grand Challenges Canada, a statement and any requested supporting documentation indicating the laws under which it is registered or incorporated, together with the registered or corporate name and place of business. This also applies to Bidders submitting a Bid as a joint venture.

## 2.5 Rights of Grand Challenges Canada

- a. Notwithstanding anything else in this Bid Solicitation, Grand Challenges Canada reserves the right, in its sole discretion, to:
  - i. Reject any or all Bids received in response to the Bid Solicitation;
  - ii. Enter into negotiations with Bidders on any or all aspects of their Bids;
  - iii. Accept any Bid in whole or in part without negotiations;
  - iv. During the evaluation, members of the evaluation team may, at their discretion, submit questions to or conduct interviews with Bidders, at Bidder cost, upon forty-eight (48) hours' notice, to seek clarification and/or verify any or all information provided by the Bidder with respect to this Bid Solicitation;
  - v. To award one or more contracts, if applicable;
  - vi. Not to accept any deviations from the stated terms and conditions in the final contract;
  - vii. Conduct a survey of Bidders' facilities and/or examine their technical, managerial and financial capabilities to determine if they are adequate to meet the requirements of the Bid Solicitation;
  - viii. Contact any or all references supplied by Bidders to verify and validate any information submitted in their Bid, if applicable;
  - ix. Correct any mathematical errors in the extended pricing of financial bids by using unit pricing and the quantities stated in the Bid Solicitation;
  - x. Verify any information provided by Bidders through independent research, use of any government resources or by contacting third parties deemed reliable by Grand Challenges Canada;
  - xi. Incorporate all or any portion of the Statement of Work, this Bid Solicitation, and the successful Bid in any resulting contract;
  - xii. Cancel the Bid Solicitation at any time without liability;
  - xiii. Reissue the Bid Solicitation without liability;
  - xiv. Extend the Bid Solicitation deadline without liability;
  - xv. If no compliant Bids are received and the requirement is not substantially modified, re-tender the requirement by inviting only the Bidders who bid to re-submit Bids within a period designated by Grand Challenges Canada;
  - xvi. Contract with vendors outside of the Bid Solicitation process; and
  - xvii. Not to award a contract in part or at all.
- b. Bidders will have the number of days specified in the request by the Grand Challenges Canada to comply with any request related to any of the above items. Failure to comply with the request may result in the Bid being declared non-responsive and disqualified from consideration.

## **2.6 Communications – Solicitation Period**

- a. To ensure the integrity of the competitive bid process, all enquiries and other communications regarding the Bid solicitation must be directed, by email, only to the individual(s) identified in the Bid Solicitation. Failure to comply can, for that reason alone, result in the disqualification of the Bid.
- b. To ensure consistency and quality of information provided to Bidders, significant enquiries received and the replies to such enquiries will be provided to all Bidders, without revealing the sources of the enquiries.

## **2.7 Costs**

- a. No payment will be made for costs incurred in the preparation and submission of a Bid in response to the Bid Solicitation. Costs associated with preparing and submitting a Bid, as well as any other costs incurred by the Bidder associated with the evaluation of the Bid, are the sole responsibility of the Bidder.
- b. No costs incurred relating to the work outlined in Appendix A: Statement of Work (“Work”) before the receipt of a signed contract or specified written authorization from the Contracting Authority can be charged to any resulting contract. In addition, the successful Bidder is not to perform Work in excess of or outside the scope of any resulting contract based on verbal or written requests or instructions from any Grand Challenges Canada personnel other than those persons specified by Grand Challenges Canada in the final contract. .

## **3.1 Governing Law**

This Bid Solicitation and any resulting contract for services shall be governed by and construed in accordance with the laws of the Province of Ontario and the federal laws of Canada applicable therein. Each Bidder agrees that any and all disputes, actions or proceedings relating to this Bid Solicitation whether as to interpretation, validity, performance or otherwise, shall be subject to the exclusive jurisdiction of the courts of the Province of Ontario and each Bidder and Grand Challenges Canada irrevocably attorn to the jurisdiction of the courts of such province.

## Part 3: Bid Preparation Instructions and Evaluation Procedures

### 3.0 Format of Bid

All Bids should include the following two clearly-identified sections:

#### Section 1: Technical Bid

In its technical bid, the Bidder must demonstrate its understanding of the requirements described in Appendix A of the Bid Solicitation, as well as demonstrate how the Bidder will meet the requirements of the Evaluation Criteria and Basis of Selection, as described in Appendix B. The technical bid **must not exceed 10 pages**, including the cover sheet and any appendices.

#### Section 2: Financial Bid

The Bidder must submit its financial bid in accordance with the **basis of fees**, as indicated in Paragraph 3.1 (a), below. The total amount of any taxes (e.g., the Harmonized Sales Tax (HST), Goods and Services Tax (GST), etc.) is to be shown separately, if applicable.

### 3.1 Mandatory Criteria for Technical and Financial Bid

a. The Bidder shall provide:

1. **Basis of fees**, which will be evaluated separately based on the submission
  - a. Bidders are required to provide their estimated fees in Canadian dollars, excluding applicable taxes, for each deliverable listed in Appendix A.
2. **History of the firm and location**, affiliation with any relevant partners or networks, size, etc.
3. **Description of support team** (see 3.2 (d), below), including bios, relevant experience and specific expertise that they will bring to this role. This section should demonstrate the ability of the firm to deliver on the specific items outlined in **Deliverables** in Appendix A.
4. **Description of support process**, including specifics regarding the level of responsiveness that Grand Challenges Canada can expect on a regular basis. This section should include details about measures in place for when the primary contact/support staff are not available.
5. **Two (2) client references ONLY**, for whom you have provided the services described in the Statement of Work: any Bidder who provides less or more than (2) references will be automatically disqualified from the bidding process and be given no further consideration.
6. **Value-added services**, including whatever the Bidder may want to add to its Bid.

### 3.2 Evaluation Criteria and Procedures

- a. Bids will be assessed against all mandatory and rated requirements identified herein and evaluated in accordance with the evaluation criteria specified in Appendix B.
- b. Only those Bids that meet all mandatory requirements identified in this Bid Solicitation will be further evaluated, based on the criteria listed in Appendix B.
- c. The Bid should be concise and should address, at a minimum, all mandatory criteria identified herein. It is suggested that the Bidder address these criteria in sufficient depth in the Bid.
- d. The Bid must identify the qualifications and experience of the **firm** and the **proposed resource personnel** who will carry out the tasks, by systematically addressing each of the experience criteria, as detailed below.
  - i. The firm's profile and resume for each proposed resource must be included in the Bid.
  - ii. For each resume submitted, the Bidder should ensure that:
    - The name of the individual is clearly indicated.
    - The resume clearly demonstrates where, when and how the stated qualifications and/or experience of the individual were acquired. For evaluation purposes:
      - **Where** means the name of the institution, as well as the position/title held.
      - **When** means the start date and end date (e.g., from January 2000 to March 2002) of the period during which the individual acquired the qualifications/experience.
      - **How** means a clear description of activities performed and the responsibilities assigned to the individual in this position and during this period.

Listing experience without providing any supporting data will not be considered to be "demonstrated" for the purpose of this evaluation. Full details should be included that describe the number of projects completed and in progress, the period of the work performed in number of months and years in past and present employment, etc.
- e. Based on the evaluation of the **technical bid** and the **financial bid**, competitive Bids could be invited for an interview. The purpose of the interview would be to further assess the capacity of the Bidders to best deliver the Work.
- f. The selected firm(s) will report to Grand Challenges Canada, and will define the process and implement the infrastructure needed to provide the contracted services.
- g. Any firm currently providing audit services to Grand Challenges Canada cannot be considered for this Bid Solicitation, due to the need for independence and perception of independence.

## Appendix A: Statement of Work

### 1. OVERVIEW

#### 1.1 Title

Innovation Portfolio Sensemaking

#### 1.2 Period of Contract

The resulting contract will be in effect from approximately February 3, 2020, to June 30, 2020, with the option to renew for up to three (3) additional one-year terms, if so desired by Grand Challenges Canada.

#### 1.3 Deadline for Submission

Grand Challenges Canada requests that each Bidder submit a Bid by email only, to the email address outlined in Paragraph 2.2, as early as possible, but **no later than 27 January 2020, at 17:00 Eastern Time.**

### 2. SCOPE OF WORK

Grand Challenges Canada is a learning organization. Each year, we conduct reviews of each of the portfolios of innovation projects that we support to assess their progress and challenges, capture lessons learned, and generate insights to inform future approaches to investing in innovation for impact. This solicited work will support Grand Challenges Canada in developing and implementing a more collaborative and participatory sensemaking approach to three (3) portfolio review processes scheduled to take place between March-May 2020.

The three selected portfolios are:

- 1) **Creating Hope in Conflict: A Humanitarian Grand Challenge.** Supported by Grand Challenges Canada, the U.S. Agency for International Development, the UK Department for International Development, the Government of the Netherlands Ministry of Foreign Affairs. It identifies and supports ground-breaking solutions that engage the private sector and draw from the experiences of affected communities in order to significantly improve and save the lives of vulnerable people affected by conflict.
- 2) **Saving Brains.** Saving Brains is a partnership of Grand Challenges Canada, Aga Khan Foundation Canada, the Bernard van Leer Foundation, the Bill & Melinda Gates Foundation, the ELMA Foundation, Grand Challenges Ethiopia, the Maria Cecilia Souto Vidigal Foundation, the Palix Foundation, the UBS Optimus Foundation and World Vision Canada. Through Saving Brains, we invest in bold ideas to improve early brain and child development globally. The portfolio focuses on three areas of healthy development (health & nutrition, enrichment and protection) that, when addressed together, set up a child to reach their full potential.
- 3) **Transition To Scale:** Supporting innovators from Canada and from low- and middle-income countries who are positioned to take their bold ideas to big impact to save and improve lives in low- and middle-income countries. Through the Transition To Scale

program, Grand Challenges Canada supports innovators financially and with technical assistance, and brokers smart partnerships that mobilize private capital and domestic public resources to generate scalable and sustainable solutions that deliver measurable social impact.

Specific tasks will include:

### **Preparation**

- Co-design interactive and participatory sensemaking workshops for Grand Challenges Canada staff for up to three (3) portfolio review processes
- Advise Grand Challenges Canada on data needs for analysis and/or synthesis to be conducted in advance of the portfolio review workshops
- Develop workshop agendas and participant briefing documents tailored to each of the three portfolio review workshops

### **Sensemaking Workshop facilitation**

- Provide skilled facilitation for each of the three one-day portfolio review workshops
- Effectively guide workshop discussions to ensure active participation of attendees, including those who may be joining over videoconference
- Provide instruction for notetakers in capturing workshop proceedings and key insights

### **Workshop follow up**

- Conduct meetings in person or remotely with small groups of Grand Challenges Canada staff to agree on follow up actions required after portfolio review workshops
- Produce final narrative summary reports and other audio or visual artefacts from the portfolio review workshops to allow for communication of the findings to the Grand Challenges Canada Board and funders, and for communication externally to audiences interested in development innovation

### **REQUIRED PROFILE:**

- Expertise in participatory sensemaking methods for organizational learning;
- Proven experience in guiding organizations through innovation portfolio management;
- Excellent presentation and facilitation skills;
- Strong understanding of the field of impact investing for development innovation (benefit to those who have specific expertise in the topic areas of the portfolios);
- Excellent English written and oral communication skills

## **3. DELIVERABLES**

1. A comprehensive workplan (maximum 10-15 pages) including a narrative description and Gantt chart for three portfolio sensemaking processes, due within two weeks after contract signing. The workplan should clearly delineate the respective responsibilities of the supplier and of Grand Challenges Canada staff during workshop preparation, implementation, and follow up.
2. Three brief guidance notes (one per workshop/portfolio, approximately two (2) pages in length each) prepared in advance for sensemaking workshop participants

3. Three draft workshop agendas agreed with Grand Challenges Canada for each portfolio review workshop no later than three (3) weeks in advance of each of the three workshop dates
4. Facilitation of three sensemaking workshops: (see estimated timeframes in the table below)
  - a. Creating Hope in Conflict: A Humanitarian Grand Challenge
  - b. Saving Brains
  - c. Transition to Scale

It is expected that the supplier will provide a minimum of two (2) skilled facilitators for each workshop. Grand Challenges Canada will provide logistical support for reserving a venue space (in Toronto), arranging catering, and providing stationery and other materials as necessary.

5. Documentation of sensemaking workshop: to include a narrative summary report, photographic images of any flipcharts or worksheets created, and any other artefacts as proposed by the supplier

Anticipated timings (to be confirmed at time of signing):

Activity	Timeframe/deadline
Contract negotiation and signing	January 30 – February 7, 2020
Development of workplan	Due two weeks after signing contract
<b>Workshop 1: Humanitarian Grand Challenge portfolio</b>	
Draft agenda	Due March 2, 2020
Guidance brief for participants and Final Agenda	Due March 9, 2020
Sensemaking Workshop 1	1 day during the week of March 23, 2020
Final documentation and artefacts from Workshop 1	Due April 6, 2020
<b>Workshop 2: Saving Brains portfolio</b>	
Draft agenda	Due April 3, 2020
Guidance brief for participants and Final Agenda	Due April 14, 2020
Sensemaking Workshop 2	April 22, 2020
Final documentation and artefacts from Workshop 1	Due May 8, 2020
<b>Workshop 3: Transition To Scale portfolio</b>	
Draft agenda	Due April 3, 2020
Guidance brief for participants and Final Agenda	Due April 14, 2020
Sensemaking Workshop 3	April 24, 2020
Final documentation and artefacts from Workshop 3	Due May 8, 2020

The supplier will have regular meetings over phone or videoconference with Grand Challenges Canada staff to prepare for the three sensemaking workshops, on a weekly or biweekly basis as needed.

## **Appendix B: Evaluation Criteria and Basis of Selection**

### **EVALUATION CRITERIA**

#### **SCORING RUBRIC FOR EVALUATION**

##### **1. Experience (45%)**

- a. Functional and technical: Does the Bidder have the:
  - i. Functional, technical or vertical expertise needed to accomplish their proposed deliverables?
  - ii. Sectoral/problem or issue-set expertise needed to accomplish their proposed deliverables?
- b. Is the Bidder effective and results-driven with the proven capacity to deliver on their objectives?

##### **2. Ability to deliver on tight timelines to achieve program goals (35%)**

- a. Does the Bid show strong feasibility to move forward the key deliverables on schedule?
- b. Does the Bid clearly articulate the key activities needed to achieve these deliverables?
- c. Will the completion of the proposed activities and deliverables help the program achieve its goals?

##### **3. Fees (20%)**

- a. Are the scope of the proposed Work and the funds requested reasonable and commensurate with the proposed goals?
- b. Does the Bid represent a particularly thoughtful and efficient use of resources?