

**RETURN BIDS TO:**  
**RETOURNER LES SOUMISSIONS À:**  
Réception des soumissions - TPSGC / Bid  
Receiving - PWGSC  
601-1550, Avenue d'Estimauville  
Québec  
Québec  
G1J 0C7

**REQUEST FOR PROPOSAL  
DEMANDE DE PROPOSITION**

**Proposal To: Public Works and Government  
Services Canada**

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

**Proposition aux: Travaux Publics et Services  
Gouvernementaux Canada**

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

**Comments - Commentaires**

<b>Title - Sujet</b> Self improving Inference Prototype		
<b>Solicitation No. - N° de l'invitation</b> W7701-135515/A	<b>Date</b> 2012-10-10	
<b>Client Reference No. - N° de référence du client</b> W7701-135515		
<b>GETS Reference No. - N° de référence de SEAG</b> PW-\$QCL-002-14900		
<b>File No. - N° de dossier</b> QCL-2-35353 (002)	<b>CCC No./N° CCC - FMS No./N° VME</b>	
<b>Solicitation Closes - L'invitation prend fin</b> <b>at - à 02:00 PM</b> <b>on - le 2012-10-26</b>		<b>Time Zone</b> <b>Fuseau horaire</b> Heure Avancée de l'Est HAE
<b>F.O.B. - F.A.B.</b> <b>Plant-Usine:</b> <input type="checkbox"/> <b>Destination:</b> <input checked="" type="checkbox"/> <b>Other-Autre:</b> <input type="checkbox"/>		
<b>Address Enquiries to: - Adresser toutes questions à:</b> Brisebois, Aline		<b>Buyer Id - Id de l'acheteur</b> qcl002
<b>Telephone No. - N° de téléphone</b> (418) 649-2883 ( )		<b>FAX No. - N° de FAX</b> (418) 648-2209
<b>Destination - of Goods, Services, and Construction:</b> <b>Destination - des biens, services et construction:</b> R&D POUR LA DEFENSE NATIONALE-VALCARTIER 2459 BLVD PIE XI NORD QUÉBEC Québec G3J1X5 Canada		

**Instructions: See Herein**

**Instructions: Voir aux présentes**

**Vendor/Firm Name and Address**  
**Raison sociale et adresse du**  
**fournisseur/de l'entrepreneur**

<b>Delivery Required - Livraison exigée</b> See Herein	<b>Delivery Offered - Livraison proposée</b>
<b>Vendor/Firm Name and Address</b> <b>Raison sociale et adresse du fournisseur/de l'entrepreneur</b>	
<b>Telephone No. - N° de téléphone</b> <b>Facsimile No. - N° de télécopieur</b>	
<b>Name and title of person authorized to sign on behalf of Vendor/Firm</b> <b>(type or print)</b> <b>Nom et titre de la personne autorisée à signer au nom du fournisseur/</b> <b>de l'entrepreneur (taper ou écrire en caractères d'imprimerie)</b>	
<b>Signature</b>	<b>Date</b>

**Issuing Office - Bureau de distribution**  
TPSGC/PWGSC  
601-1550, Avenue d'Estimauville  
Québec  
Québec  
G1J 0C7

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qc1002

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## PART 1 - GENERAL INFORMATION

### 1. Introduction

The bid solicitation document is divided into seven parts plus attachments and annexes as follows:

Part 1 General Information: provides a general description of the requirement;

Part 2 Bidder Instructions: provides the instructions, clauses and conditions applicable to the bid solicitation;

Part 3 Bid Preparation Instructions: provides bidders with instructions on how to prepare their bid;

Part 4 Evaluation Procedures and Basis of Selection: indicates how the evaluation will be conducted, the evaluation criteria that must be addressed in the bid, if applicable, and the basis of selection;

Part 5 Certifications: includes the certifications to be provided;

Part 6 Resulting Contract Clauses: includes the clauses and conditions that will apply to any resulting contract.

The annexes include:

The Statement of Work, the Basis of Payment and Contractor Disclosure of Foreground Information

### 2. Summary

The Statement of Work (SOW) describe the services required by Defence R&D Canada - Valcartier (DRDC Valcartier) aimed at carrying out the following objectives :

#### (i) The objectives of the work are:

- The development of a self improving inference prototype to support the IPB/IPOE processes.
- Support the demonstration, validation, and experimentation with the prototype.

### Background

DRDC Valcartier has undertaken a research and development (R&D) Applied Re-search Projects (ARP) entitled "Self Improving Inference System (SIIS) to Support the Intelligence Preparation of the Battlefield (IPB) Process".

The main objective of the SIIS project is to produce a prototype of a self improving inference system to support the analysis and sensemaking aspects of the Intelli-gence Preparation of the Battlefield/Intelligence Preparation of the Operational Environment (IPB/IPOE). This prototype must be capable of learning and improving based on both its current performance and operator feedback.

The objective of the current contract is to develop a self improving inference proto-type to support the IPB/IPOE processes. The prototype must be integrated in, and leverage as much of the Intelligence Science and Technology Integration Platform (ISTIP) inference tools as is possible.

**(ii) Client department**

The services will be rendered to Defence Research and Development Canada (DRDC-Valcartier).

**(iii) Period of the contract :**

The period of the Contract is from date of Contract **for a period of 15 months.**

**(iv) Ownership of Intellectual Property :**

Defence Research and Development Canada - Valcartier has determined that any intellectual property rights arising from the performance of the Work under the resulting contract will belong to Canada.

**(v) Other information :**

The requirement is subject to the provisions of the Agreement on Internal Trade (AIT).

The requirement is subject to a preference for Canadian services.

**IMPORTANT NOTICE: New measures related to Code of Conduct and certifications included in the solicitation documents requires attention.**

**3. Debriefings**

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

## PART 2 - BIDDER INSTRUCTIONS

### 1. Standard Instructions, Clauses and Conditions

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

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

The 2003 (2012-07-11) Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation.

**The text under Subsection 4 of Section 01 - Code of Conduct and Certifications of 2003 referenced above is replaced by:**

Bidders should provide, with their bid or promptly thereafter, a complete list of names of all individuals who are currently directors of the Bidder. If such a list has not been received by the time the evaluation of bids is completed, Canada will inform the Bidder of a time frame within which to provide the information. Failure to provide such a list within the required time frame will render the bid non-responsive. Bidders must always submit the list of directors before contract award.

Canada may, at any time, request that a Bidder provide properly completed and Signed Consent Forms (Consent to a Criminal Record Verification form - PWGSC-TPSGC 229) for any or all individuals named in the aforementioned list within a specified delay. Failure to provide such Consent Forms within the delay will result in the bid being declared non-responsive.

**The text under Subsection 5 of Section 01 - Code of Conduct and Certifications of 2003 referenced above is replaced by:**

The Bidder must diligently maintain the list up-to-date by informing Canada in writing of any change occurring during the validity period of the bid, and must also provide Canada, when requested, with the corresponding Consent Forms. The Bidder will also be required to diligently maintain the list and when requested, provide Consent Forms during the period of any contract arising from this bid solicitation.

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

Delete: sixty (60) days

Insert: a hundred twenty (120) days

## 1.1 SACC Manual Clauses

A7035T (2007-05-25), List of Proposed Subcontractors

## 2. Submission of Bids

Bids must be submitted only to Public Works and Government Services Canada (PWGSC) Bid Receiving Unit by the date, time and place indicated on page 1 of the bid solicitation.

Due to the nature of the bid solicitation, bids transmitted by facsimile to PWGSC will not be accepted.

## 3. Enquiries - Bid Solicitation

All enquiries must be submitted in preference by e-mail at the address [Aline.Brisebois@tpsgc-pwgsc.gc.ca](mailto:Aline.Brisebois@tpsgc-pwgsc.gc.ca) in writing to the Contracting Authority no later than seven (7) calendar days before the bid closing date. Enquiries received after that time may not be answered.

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

## 4. Applicable Laws

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

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

## 5. Basis for Canada's Ownership of Intellectual Property

Defence Research and Development Canada - Valcartier has determined that any intellectual property rights arising from the performance of the Work under the resulting contract will belong to Canada.

*The Treasury Board, granted Defence Research and Development Canada exemption from the Treasury Board Policy on "Title to Intellectual Property Arising Under Crown Procurement Contracts"*

## 6. Maximum Funding

The maximum funding available for the contract resulting from the bid solicitation is **\$390 000.00** (Goods and Services Tax or the Harmonized Sales Tax extra, as appropriate). Bids valued in excess of this amount will be considered non-responsive. This disclosure does not commit Canada to pay the maximum funding available.

## **PART 3 - BID PREPARATION INSTRUCTIONS**

### **1. Bid Preparation Instructions**

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

Section I : Technical Bid **(4 hard copies) and 2 soft copies on CD, DVD)**

Section II : Financial Bid **(4 hard copies) and 2 soft copies on CD, DVD)**

Section III : Certifications **( 1 hard copy)**

If there is a discrepancy between the wording of the soft copy and the hard copy, the wording of the hard copy will have priority over the wording of the soft copy.

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

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

- (a) use 8.5 x 11 inch (216 mm x 279 mm) paper;
- (b) use 30% recycled paper;
- (c) print double sided (duplex printing);
- (d) use a numbering system that corresponds to the bid solicitation; and
- (e) submit bound bids using cerlox, staples, etc., but no binders.

#### **Section I : Technical Bid**

In their technical bid, bidders should demonstrate their understanding of the requirements contained in the bid solicitation and explain how they will meet these requirements. Bidders should demonstrate their capability and describe their approach in a thorough, concise and clear manner for carrying out the work.

The technical bid should clearly address and in sufficient depth the points that are subject to the evaluation criteria against which the bid will be evaluated. Simply repeating the statement contained in the bid solicitation is not sufficient. In order to facilitate the evaluation of the bid, Canada requests that bidders address and present topics in the order of the evaluation criteria under the same headings. To avoid duplication, bidders may refer to different sections of their bids by identifying the specific paragraph and page number where the subject topic has already been addressed.

#### **Section II: Financial Bid**

**1.1** Bidders must submit their financial bid in accordance with the following :

- (a) A Total Cost to a Limitation of Expenditure, which must not exceed the maximum funding specified in Part 2. The total amount of Goods and Services Tax or Harmonized Sales Tax is to be shown separately, if applicable. The information should be provided in accordance with the Financial Bid Presentation Sheet below.



- (b) For Canadian-based bidders, prices must be in Canadian funds, Canadian customs duties and excise taxes included, and Goods and Services Tax (GST) or Harmonized Sales Tax (HST) excluded.

For the purpose of the bid solicitation, bidders with an address in Canada are considered Canadian-based bidders and bidders with an address outside of Canada are considered foreign-based bidders.

## FINANCIAL BID PRESENTATION SHEET

1. **LABOUR:** at firm all-inclusive rates, GST/HST extra, F.O.B. Destination (for goods), in accordance with the following:

**BIDDERS ARE REQUESTED TO QUOTE ONE RATE PER PROPOSED RESOURCE, PER PERIOD.**

**If the resource works for a subcontractor, bidders must also provide the name of the subcontractor.**

Proposed Resources	Firm Hourly Rate Proposed Contract Period				Extended Total per Resource
	Date of Award to 31 March 2013	Total Est. Hours	1 April 2013 to 30 January 2014	Total Est. Hours	
	\$		\$		\$
	\$		\$		\$
	\$		\$		\$
	\$		\$		\$
	\$		\$		\$
	\$		\$		\$

TOTAL ESTIMATED LABOUR: \$ \_\_\_\_\_

*Items 2. through 7. shall be completed if the Bidder's rates in 1. above do not include the following:*

2. **EQUIPMENT:** at laid down cost without markup

Description

Price

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

TOTAL ESTIMATED EQUIPMENT: \$ \_\_\_\_\_

## 3. RENTALS: at actual cost without markup

Description

Price

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TOTAL ESTIMATED RENTALS: \$ \_\_\_\_\_

## 4. MATERIALS AND SUPPLIES: at laid down cost without markup

Description

Price

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TOTAL ESTIMATED MATERIALS AND SUPPLIES: \$ \_\_\_\_\_

## 5. SUBCONTRACTS: at actual cost without markup

Support for the proposed subcontractor's price is required in the same details as that required for the Bidder's price. The estimated price for subcontracts should include all direct charges and travel & living expenses which would be to the account of the subcontractor.

TOTAL ESTIMATED SUBCONTRACTS: \$ \_\_\_\_\_

6. TRAVEL & LIVING: at actual cost without markup but not to exceed the limits of the Treasury Board Travel Directive. With respect to the TB Travel Directive, only the meal, private vehicle and incidental allowances specified in Appendices B, C and D of the TB Travel Directive <http://www.tbs-sct.gc.ca/hr-rh/gtla-vgcl/> and the other provisions of the directive referring to "travellers" rather than those referring to "employees", are applicable. *Details are to be provided on a separate sheet.*

TOTAL ESTIMATED TRAVEL &amp; LIVING: \$ \_\_\_\_\_

## 7. OTHER DIRECT CHARGES: at actual cost without markup

TOTAL ESTIMATED OTHER DIRECT CHARGES: \$ \_\_\_\_\_

**ESTIMATED COST TO A LIMITATION OF EXPENDITURE**

\$ \_\_\_\_\_  
(GST/HST extra)

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## **1.2 SACC Manual Clauses**

C3010T (2010-01-11), Exchange Rate Fluctuation

### **Section III: Certifications**

Bidders must submit the certifications required under Part 5.

## **PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION**

### **1. Evaluation Procedures**

- (a) Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria.
- (b) An evaluation team composed of representatives of Canada will evaluate the bids.
- (c) The evaluation team will determine first if there are three (3) or more bids with a valid Canadian Content certification. In that event, the evaluation process will be limited to the bids with the certification; otherwise, all bids will be evaluated. If some of the bids with a valid certification are declared non-responsive, or are withdrawn, and less than three responsive bids with a valid certification remain, the evaluation will continue among those bids with a valid certification. If all bids with a valid certification are subsequently declared non-responsive, or are withdrawn, then all the other bids received will be evaluated.

#### **1.1 Technical Evaluation**

Except where expressly provided otherwise, the experience described in the bid must be the experience of the Bidder itself (which includes the experience of any companies that formed the Bidder by way of a merger but does not include any experience acquired through a purchase of assets or an assignment of contract). The experience of the Bidder's affiliates (i.e. parent, subsidiary or sister corporations), subcontractors, or suppliers will not be considered.

### 1.1.2 Point Rated Technical Criteria

Evaluation criteria	Evaluation Scale	Max	Min
<b>Point(s) between 0 and the maximum will be attributed for each criteria of this section</b>			
<b>1. TECHNICAL PROPOSAL / STRATEGY, APPROACH, METHODOLOGY</b>		<b>30</b>	<b>18</b>
<b>1.1 - Degree of understanding of context, scope and objectives</b>  The bidder should clearly demonstrate in its own words its understanding of the context, scope and objectives. It should not be limited to the description provided in the statement of work.  The required elements for this criteria are : a. There is a brief introduction. b. There is a concise evaluation of: i. the project needs, ii. the objectives of the proposed work, iii. the reasons that justify the conduct of the work as proposed. c. The text is concise, d. The text is clear and easy to understand.	10 pts: Excellent understanding of context, scope and objectives demonstrated. All required elements are there. Understanding is beyond expectations.  8 pts: Very good understanding of context, scope and objectives demonstrated. All required elements are there. The text is concise without confusion  6 pts: Good understanding of context, scope and objectives demonstrated. All required elements are there. The text is relatively concise, without major confusion.  4 pts: Average understanding of context, scope and objectives demonstrated. The text is either not concise enough, or it presents important confusion.  2 pts: Poor understanding of context, scope and objectives demonstrated. Many required elements are missing. The text is not concise enough, presents important confusion.  0 pt: Very Poor understanding of context, scope and objectives demonstrated. Most required elements are missing. The text is not concise and presents important confusion.	10	

<p><b>1.2 - Recognition of all direct and related problems and ability to resolve them</b></p> <p>The bidder should indicate all significant difficulties that they expect to encounter in and how they intend to resolve them. Issues and challenges related to the domain and the nature of the required work should be addressed.</p>	<p>10 pts: Excellent indication of foreseen difficulties and matching coping strategy. All identified potential problems were relevant and good solutions are proposed for all of them.</p> <p>8 pts: Very good indication of foreseen difficulties and matching coping strategy. Most identified potential problems were relevant and good solutions are proposed for all of them.</p> <p>6 pts: Good indication of foreseen difficulties and matching coping strategy. Most identified potential problems were relevant and good solutions are proposed for some of them.</p> <p>4 pts: Average indication of foreseen difficulties and matching coping strategy. Some identified potential problems were relevant and some good solutions are proposed for some of them.</p> <p>2 pts: Poor indication of foreseen difficulties and matching coping strategy. Few identified potential problems were relevant and few good solutions are proposed for all of them.</p> <p>0 pt: Very poor indication of foreseen difficulties and matching coping strategy. Few identified potential problems were relevant and poor solutions are proposed for them.</p>	10	
<p><b>1.3 - Strategy and methodology proposed to achieve objectives</b></p> <p>The bidder should clearly describe the strategy and methodology they intend to adopt to meet the requirements and should provide an assessment of the level of success anticipated. The technical strategy proposed should be consistent with the requirements of the statement of work included in the request for proposals. Sufficient detail should be provided to demonstrate that the methodology proposed will ensure that the objectives are achieved.</p>	<p>10 pts: Excellent strategy and methodology proposed to achieve objectives. Description of strategy and methodology is very clear and precise. The proposed approach fully meets the needs of the project.</p> <p>8 pts: Very good strategy and methodology proposed to achieve objectives. Description of strategy and methodology is very clear and precise. The proposed approach meets the needs of the project very well.</p> <p>6 pts: Good strategy and methodology proposed to achieve objectives. Description of strategy and methodology is very clear or precise. The proposed approach meets the needs of the project.</p> <p>4 pts: Average strategy and methodology proposed to achieve objectives. Description of strategy and methodology is limited. The proposed approach partially meets some needs of the project.</p> <p>2 pts: Poor strategy and methodology proposed to achieve objectives. Description of strategy and methodology is inadequate. The proposed approach meets few needs of the project.</p> <p>0 pt: Very Poor strategy and methodology proposed to achieve objectives. Description of strategy and methodology is inadequate. The proposed approach meets almost no needs of the project.</p>	10	

<b>2. TECHNICAL PROPOSAL / DEMONSTRATION OF KNOWLEDGE</b>		<b>20</b>	<b>15</b>
<b>2.1 - Expertise in Service Oriented Architecture (SOA)</b>  In 3 pages or less, the bidder should demonstrate its knowledge of SOA in its own words. It should discuss the elements of SOA in the specific context of this project.	5 pts: Excellent knowledge of SOA demonstrated. All aspects of SOA are clearly discussed in the specific context of the contract. 4 pts: Very good knowledge of SOA demonstrated. Almost all aspects of SOA are clearly discussed in the specific context of the contract. 3 pts: Good knowledge of SOA demonstrated. Most aspects of SOA are clearly discussed in the specific context of the contract. 2 pts: Average knowledge of SOA demonstrated. Some aspects of SOA are clearly discussed in the specific context of the contract. 1 pts: Poor knowledge of SOA demonstrated. Few aspects of SOA are clearly discussed in the specific context of the contract. 0 pt: Very poor knowledge of SOA demonstrated. Almost no aspects of SOA are clearly discussed in the specific context of the contract.	5	
	<b>2.2 - Expertise in Case-Based Reasoning and Relevant Learning Approaches (CBR&amp;L)</b>  In 3 pages or less, the bidder should demonstrate its knowledge of CBR&L in its own words. It should discuss the elements of CBR&L in the specific context of this project.	10	

<p><b>2.3 - Expertise in Intelligence Preparation of the Battlefield (IPB)/Intelligence Preparation of the Operational Environment (IPOE)</b></p> <p>In 3 pages or less, the bidder should demonstrate its knowledge of IPB/IPOE in its own words. It should discuss the elements of IPB/IPOE in the specific context of this project. Relevance of highlighted IPB/IPOE aspects with connection to the project and its tasks will also be evaluated.</p>	<p>5 pts: Excellent knowledge of IPB/IPOE demonstrated. All aspects of IPB/IPOE are clearly discussed in the specific context of the contract.</p> <p>4 pts: Very good knowledge of IPB/IPOE demonstrated. Almost all aspects of IPB/IPOE are clearly discussed in the specific context of the contract.</p> <p>3 pts: Good knowledge of IPB/IPOE demonstrated. Most aspects of IPB/IPOE are clearly discussed in the specific context of the contract.</p> <p>2 pts: Average knowledge of IPB/IPOE demonstrated. Some aspects of IPB/IPOE are clearly discussed in the specific context of the contract.</p> <p>1 pt: Poor knowledge of IPB/IPOE demonstrated. Few aspects of IPB/IPOE are clearly discussed in the specific context of the contract.</p> <p>0 pt: Very poor knowledge of IPB/IPOE demonstrated. Almost no aspects of IPB/IPOE are clearly discussed in the specific context of the contract.</p>	5	
<b>3. EXPERIENCE AND KNOWLEDGE OF PERSONNEL DIRECTLY INVOLVED IN PROJECT</b>	<b>245</b>	<b>140</b>	



<p><b>3.1 - Competence of the Military Subject Matter Expert (SME) in Intelligence and IPB/IPOE</b></p> <p>The bidder should demonstrate the competence in Intelligence and IPB/IPOE of the identified military SME by precisely describing the contexts in which that competence was gained. Context refers to conditions in which a given competence was acquired. It can include professional experience, formation or training.</p> <p>Professional experience, formation and training should be detailed in order to clearly demonstrate competence. Professional detail should include (to a minimum) nature of the function, context of execution, tasks executed and specific expertise gained. Formation and training detail should include (to a minimum) the name, length, location of the training/formation, the official classification/title obtained, and an explanation of specific knowledge gained.</p> <p>Months of experience, detailed formation and training in Intelligence will be considered. Well demonstrated experience, formation and training in conducting IPB/IPOE will award bonus points.</p> <p>If numerous people are identified for this field, the global score will be attributed based on the relative involvement of each military SME in the tasks dealing with the relevant topic of interest.</p> <p>For example, two specialists are proposed for a given field: specialist A is awarded 20 points and is doing 75% of the work, specialist B is awarded 10 points and is doing 25% of the work. The global score would be <math>20 \times 0.75 + 10 \times 0.25 = 17.5</math>.</p>	<p>a) Training and professional experience: 20 pts: Very strong competence in Intelligence clearly demonstrated. Extensive professional experience (more than 60 months of experience), formation, and training detailed in this area. 10 pts: Competence in intelligence demonstrated. Some professional experience (between 24 and 60 months of experience) and some formation/training detailed in this area. 5 pts: Partial competence in intelligence demonstrated. Little professional experience (between 12 and 23 months of experience) and formation/training detailed in this area. 0 pt: Limited or no competence in intelligence demonstrated. Short or no professional experience (less than 12 months of experience) and lack of information about the formation/training of the proposed resource in this area.</p> <p>b) Bonus score: i. Detailed professional experience conducting IPB/IPOE (5 points per relevant context, maximum score: 15 points) ii. Detailed training/formation on IPB/IPOE (5 points per relevant training/formations, maximum score: 10 points)</p>	45	
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<p><b>3.2 - Scientific competence of the Case-Based Reasoning and Learning (CBR&amp;L) Subject Matter Expert (SME)</b></p> <p>The bidder should demonstrate the scientific competence of the CBR&amp;L SME involved in the project by describing the contexts in which that competence was gained. Context refers to conditions in which a given competence was acquired. It can include professional experience, formation or training.</p> <p>Professional experience, formation and training should be detailed in order to clearly demonstrate competence of the proposed resource. Professional detail should include (to a minimum) nature of the function, context of execution, specific tasks executed and specific expertise gained - the number of weeks worked on a specific task should be specified. Academic formation and training detail should include (to a minimum) the name, length, location of the training/formation, the official classification/title obtained, and an explanation of specific knowledge gained. Competence in scientific fields with strong relation with CBR&amp;L will only be considered.</p> <p>The professional experience should be detailed in a way to clearly demonstrate the relevance of the work to the CBR&amp;L. The tasks done in the professional context should be detailed for every week.</p> <p>The relevance of the university degree or publication with the topic of interest should be clearly explained (specific studies, publications).</p> <p>The diploma should be received from a recognized Canadian university, or the equivalent as established by a recognized Canadian academic credentials assessment service*, if obtained outside Canada.</p> <p>*The list of recognized organizations can be found under the Canadian Information Centre for International Credentials website, at the following internet link: <a href="http://www.cicic.ca/indexe.stm">http://www.cicic.ca/indexe.stm</a></p>	<p>a) Education of the proposed resource :</p> <p>50 pts: Doctorate degree in a field directly related to CBR&amp;L.</p> <p>25 pts: Masters degree in a field directly related to CBR&amp;L.</p> <p>10 pts: Bachelor degree in a field directly related to CBR&amp;L.</p> <p>0 pt: Any other situation.</p> <p>b) Professional experience of the proposed resource :</p> <p>25 pts: More than 120 months of professional experience directly related to CBR&amp;L.</p> <p>20 pts: Between 84 and 120 months of professional experience directly related to CBR&amp;L.</p> <p>15 pts: Between 60 and 83 months of professional experience directly related to CBR&amp;L.</p> <p>10 pts: Between 24 and 59 months of professional experience directly related to CBR&amp;L.</p> <p>5 pts: Between 6 and 23 months of professional experience directly related to the CBR&amp;L.</p> <p>0 pt: Less than 6 months of professional experience directly related to CBR&amp;L.</p> <p>c) Bonus score :</p> <p>For each scientific publication published by the proposed resource in a conference or journal on one CBR&amp;L, 5 points will be attributed to the bidder (maximum: 25 bonus points).</p>	100	
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<p><b>3.3- Technical competence of the personnel directly involved in the project - GUI Development.</b></p> <p>The bidder should demonstrate the technical competence of the personnel to be involved in the project by describing the contexts in which that competence was gained. Professional experience, formation and training should be detailed in order to clearly demonstrate competence. Professional detail should include (to a minimum) nature of the function, context of execution, specific tasks executed and specific expertise gained - the number of weeks worked on a specific task should be specified. Academic formation and training detail should include (to a minimum) the name, length, location of the training/formation, the official classification/title obtained, and an explanation of specific knowledge gained.</p> <p>If numerous people are identified, the global score will be attributed based on the relative involvement of each expert in the tasks dealing with GUI development.</p> <p>The professional experience should be detailed in a way to clearly demonstrate the relevance of the work to the topic of interest. The tasks done in the professional context should be detailed for every week.</p> <p>A person may be proposed for more than one topic of interest.</p> <p>Proposed personel for GUI development will be evaluated on the following subjects:</p> <ul style="list-style-type: none"> <li>a. Client Tier RIA (Rich Internet Application) Development (50%)</li> <li>b. JavaScript Development (20%)</li> <li>c. Google Web Toolkit (GWT) Development (20%)</li> <li>d. Open Layers Development (10%)</li> </ul> <p>Each subject will be evaluated on 100 points the multiplied by the relative importance of the subject.</p> <p>The total obtained will be brought back on 30 points.</p>	<p>80 pts: Over 120 months of professional experience directly related to the topic of interest.</p> <p>60 pts: Between 60 and 120 months of professional experience directly related to the topic of interest.</p> <p>40 pts: 60 months or more of professional experience directly related to the topic of interest.</p> <p>20 pts: Between 24 and 60 months of professional experience directly related to the topic of interest.</p> <p>10 pts: 24 months of professional experience directly related to the topic of interest.</p> <p>Specific training or certification on a Technical aspect directly related to GUI development will also be recognized.</p> <p>Each recognized formation or certification session on a specific topic of interest will yield a 10 pts bonus. (for a maximum of 20)</p>	30	
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<p><b>3.4- Technical competence of the personnel directly involved in the project - Software Development.</b></p> <p>The bidder should demonstrate the technical competence of the personnel to be involved in the project by describing the contexts in which that competence was gained. Professional experience, formation and training should be detailed in order to clearly demonstrate competence. Professional detail should include (to a minimum) nature of the function, context of execution, specific tasks executed and specific expertise gained - the number of weeks worked on a specific task should be specified. Academic formation and training detail should include (to a minimum) the name, length, location of the training/formation, the official classification/title obtained, and an explanation of specific knowledge gained.</p> <p>If numerous people are identified, the global score will be attributed based on the relative involvement of each expert in the tasks dealing with software development.</p> <p>The professional experience should be detailed in a way to clearly demonstrate the relevance of the work to the topic of interest. The tasks done in the professional context should be detailed for every week.</p> <p>A person may be proposed for more than one topic of interest.</p> <p>Proposed personnel for GUI development will be evaluated on the following subjects:</p> <ul style="list-style-type: none"> <li>a. Web based development (50%)</li> <li>b. Web service messaging programming SOAP or REST (30%)</li> <li>c. Java EE (20 %)</li> </ul> <p>Each subject will be evaluated on 100 points the multiplied by the relative importance of the subject.</p> <p>The total obtained will be brought back on 35 points.</p>	<p>80 pts: Over 120 months of professional experience directly related to the topic of interest.</p> <p>60 pts: Between 60 and 120 months of professional experience directly related to the topic of interest.</p> <p>40 pts: 60 months or more of professional experience directly related to the topic of interest.</p> <p>20 pts: Between 24 and 60 months of professional experience directly related to the topic of interest.</p> <p>10 pts: 24 months of professional experience directly related to the topic of interest.</p> <p>Specific training or certification on a Technical aspect directly related to software development will also be recognized.</p> <p>Each recognized formation or certification session on a specific topic of interest will yield a 10 pts bonus. (for a maximum of 20)</p>	35	
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<p><b>3.5- Technical competence of the personnel directly involved in the project - 3- Service Oriented Architecture.</b></p> <p>The bidder should demonstrate the technical competence of the personnel to be involved in the project by describing the contexts in which that competence was gained. Professional experience, formation and training should be detailed in order to clearly demonstrate competence. Professional detail should include (to a minimum) nature of the function, context of execution, specific tasks executed and specific expertise gained - the number of weeks worked on a specific task should be specified. Academic formation and training detail should include (to a minimum) the name, length, location of the training/formation, the official classification/title obtained, and an explanation of specific knowledge gained.</p> <p>If numerous people are identified, the global score will be attributed based on the relative involvement of each expert in the tasks dealing with Service Oriented Architecture.</p> <p>The professional experience should be detailed in a way to clearly demonstrate the relevance of the work to the topic of interest. The tasks done in the professional context should be detailed for every week.</p> <p>A person may be proposed for more than one topic of interest.</p> <p>Proposed personel for GUI development will be evaluated on the following subjects:</p> <ul style="list-style-type: none"> <li>a. 3-Tier software architecture (50%)</li> <li>b. Web services Architecture (20%)</li> <li>c. Java EE Architecture (20%)</li> <li>d. Client Tier RIA (Rich Internet Application) Architecture (10%)</li> </ul> <p>Each subject will be evaluated on 100 points the multiplied by the relative importance of the subject.</p> <p>The total obtained will be brought back on 35 points.</p>	<p>80 pts: Over 120 months of professional experience directly related to the topic of interest.</p> <p>60 pts: Between 60 and 120 months of professional experience directly related to the topic of interest.</p> <p>40 pts: 60 months or more of professional experience directly related to the topic of interest.</p> <p>20 pts: Between 24 and 60 months of professional experience directly related to the topic of interest.</p> <p>10 pts: 24 months of professional experience directly related to the topic of interest.</p> <p>Specific training or certification on a Technical aspect directly related to service oriented architecture will also be recognized.</p> <p>Each recognized formation or certification session on a specific topic of interest will yield a 10 pts bonus. (for a maximum of 20)</p>	35	
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<b>4. PROJECT MANAGER</b>		<b>15</b>	<b>7</b>
<b>4.1 - Experience of project manager</b>  The bidder should demonstrate the experience of its proposed Project Manager in the management of scientific projects involving Software development.	10 pts: At least 60 months of experience in this area. 8 pts: Between 48 and 59 months of experience in this area. 6 pts: Between 36 and 47 months of experience in this area. 4 pts: Between 24 and 35 months of experience in this area. 2 pts: Between 6 and 23 months of experience in this area. 0 pt: Less than 6 months of experience in this area.	10	
<b>4.2 - Education of project manager</b>  The bidder should demonstrate the formal education completed by its proposed Project Manager in project management.	5 pts: More than 300 hours of education completed in this area. 3 pts: Between 150 hours and 300 hours of education completed in this area. 1 pt: Between 35 hours and 149 hours of education completed in this area. 0 pt: Less than 35 hours of education completed in this area.	5	
<b>5. MANAGEMENT - TASK/TIME ALLOCATION</b>		<b>40</b>	<b>25</b>

<b>5.1 - Task/time allocation</b>  The bidder should clearly describe how it intends to allocate hours of work to each project task, i.e., the estimated number of hours to be worked by each person. The task/time allocation should be appropriate to meet the objectives of the project.	40 pts: Appropriate number of hours attributed for every task to meet the objectives of the project. 25 pts: Appropriate number of hours attributed for almost every task to meet the objectives of the project. Some minor changes to the proposal will be required. 0 pt: Inappropriate number of hours attributed for almost task or for every task. Too many changes are required to meet the objectives of the project.	40	25
<b>6. MANAGEMENT - ASSIGNMENT OF PERSONNEL</b>		50	30

<b>6.1 - Assignment of personnel</b>  The bidder should clearly describe how it intends to assign its personnel to the various tasks and the role of each resource with regard to each task. Personnel assignments should be realistic, relevant and appropriate to meet the objectives of the project.	50 pts: All personnel, including identified experts (military and scientific), are assigned an appropriate level of effort for every project task relevant to their field of expertise, including project management.  40 pts: At least 80% of personnel, including identified experts (military and scientific), are assigned an appropriate level of effort for every project task relevant to their field of expertise, including project management.  30 pts: At least 70% of personnel, including identified experts (military and scientific), are assigned an appropriate level of effort for every project task relevant to their field of expertise, including project management.  20 pts: At least 60% of personnel, including identified experts (military and scientific), are assigned an appropriate level of effort for every project task relevant to their field of expertise, including project management.	50	
<b>7. CAPABILITIES AND EXPERIENCE OF FIRM</b>		<b>10</b>	<b>4</b>
<b>7.1 - Number of scientific projects involving software development with a budget of at least \$150K completed by the bidder in the last 10 years.</b>	10 pts: At least 5 projects completed in this area. 8 pts: 3 or 4 projects completed in this area. 6 pts: 2 projects completed in this area. 4 pts: 1 project completed in this area. 0 pt: No project completed in this area.	10	4
<b>1. TECHNICAL PROPOSAL / STRATEGY, APPROACH, METHODOLOGY</b>		<b>30</b>	<b>18</b>
<b>2. TECHNICAL PROPOSAL / DEMONSTRATION OF EXPERTISE</b>		<b>20</b>	<b>15</b>
<b>3. COMPETENCE OF PERSONNEL DIRECTLY INVOLVED IN PROJECT</b>		<b>245</b>	<b>140</b>
<b>4. MANAGEMENT - PROJECT MANAGER</b>		<b>15</b>	<b>7</b>
<b>5. MANAGEMENT - TASK/TIME ALLOCATION</b>		<b>40</b>	<b>25</b>
<b>6. MANAGEMENT - ASSIGNMENT OF PERSONNEL</b>		<b>50</b>	<b>30</b>
<b>7. CAPABILITIES AND EXPERIENCE OF FIRM</b>		<b>10</b>	<b>4</b>
<b>TOTAL</b>		<b>410</b>	<b>239</b>



## **1.2 Financial Evaluation**

### **1.2.1 Mandatory Financial Criteria**

The Bidder must submit a Basis of Payment to a Limitation of Expenditure that does not exceed the maximum funding specified in Part 2, GST/HST excluded, FOB Destination (for goods), all applicable customs duty and excise taxes included.

### **1.2.2 Evaluation of Price**

The price of the bid will be evaluated in Canadian dollars, the Goods and Services Tax or the Harmonized Sales Tax excluded, FOB destination, Canadian customs duties and excise taxes included.

## **2. Basis of Selection**

### **2.1 Basis of Selection - Highest Rated Within Budget**

To be declared responsive, a bid must:

- (a) comply with all the requirements of the bid solicitation;
- (b) obtain the required minimum points for each criteria and each group of criteria with a pass mark; and
- (c) obtain the required minimum points overall for the technical evaluation criteria which are subject to point rating.

Bids not meeting (a) or (b) or (c) will be declared non responsive. The responsive bid with the highest number of points will be recommended for award of a contract, provided that the total evaluated price does not exceed the budget available for this requirement. In the event that the highest number of points is obtained by more than one responsive bid, the responsive bid with the lowest evaluated price will be recommended for award of a contract.

## PART 5 - CERTIFICATIONS

Bidders must provide the required certifications to be awarded a contract. Canada will declare a bid non-responsive if the required certifications are not completed and submitted as requested.

Compliance with the certifications bidders provide to Canada is subject to verification by Canada during the bid evaluation period (before award of a contract) and after award of a contract. The Contracting Authority will have the right to ask for additional information to verify the bidders' compliance with the certifications before award of a contract. The bid will be declared non-responsive if any certification made by the Bidder is untrue, whether made knowingly or unknowingly. Failure to comply with the certifications or to comply with the request of the Contracting Authority for additional information will also render the bid non-responsive.

### 1. Code of Conduct Certifications - Certifications Required Precedent to Contract Award

- 1.1 Bidders should provide, **with their bids or promptly thereafter**, a complete list of names of all individuals who are currently directors of the Bidder. If such a list has not been received by the time the evaluation of bids is completed, the Contracting Authority will inform the Bidder of a time frame within which to provide the information. Bidders must submit the list of directors before contract award, failure to provide such a list within the required time frame will render the bid non-responsive.

The Contracting Authority may, at any time, request that a Bidder provide properly completed and Signed Consent Forms (Consent to a Criminal Record Verification form - PWGSC-TPSGC 229) for any or all individuals named in the aforementioned list within a specified delay. Failure to provide such Consent Forms within the delay will result in the bid being declared non-responsive.

### 2. Certifications Precedent to Contract Award

The certifications listed below should be completed and submitted with the bid but may be submitted afterwards. If any of these required certifications is not completed and submitted as requested, the Contracting Authority will so inform the Bidder and provide the Bidder with a time frame within which to meet the requirement. Failure to comply with the request of the Contracting Authority and meet the requirement within that time period will render the bid non-responsive.

#### 2.1 Federal Contractors Program - \$200,000 or more

1. The Federal Contractors Program (FCP) requires that some suppliers, including a supplier who is a member of a joint venture, bidding for federal government contracts, valued at \$200,000 or more (including all applicable taxes), make a formal commitment to implement employment equity. This is a condition precedent to contract award. If the Bidder, or, if the Bidder is a joint venture and if any member of the joint venture, is subject to the FCP, evidence of its commitment must be provided before the award of the Contract.

Suppliers who have been declared ineligible contractors by Human Resources and Skills Development Canada (HRSDC) are no longer eligible to receive government contracts over the threshold for solicitation of bids as set out in the *Government Contracts Regulations*. Suppliers may be declared ineligible contractors either as a result of a finding of non-compliance by HRSDC, or following their voluntary withdrawal from the FCP for a reason other than the

reduction of their workforce to less than 100 employees. Any bids from ineligible contractors, including a bid from a joint venture that has a member who is an ineligible contractor, will be declared non-responsive.

2. If the Bidder does not fall within the exceptions enumerated in 3.(a) or (b) below, or does not have a valid certificate number confirming its adherence to the FCP, the Bidder must fax (819-953-8768) a copy of the signed form LAB 1168, Certificate of Commitment to Implement Employment Equity, to the Labour Branch of HRSDC.

3. The Bidder, or, if the Bidder is a joint venture the member of the joint venture, certifies its status with the FCP, as follows:

The Bidder or the member of the joint venture

- (a) ☐ is not subject to the FCP, having a workforce of less than 100 full-time or part-time permanent employees, and/or temporary employees having worked 12 weeks or more in Canada;
- (b) ☐ is not subject to the FCP, being a regulated employer under the *Employment Equity Act*, S.C. 1995, c. 44;
- (c) ☐ is subject to the requirements of the FCP, having a workforce of 100 or more full-time or part-time permanent employees, and/or temporary employees having worked 12 weeks or more in Canada, but has not previously obtained a certificate number from HRSDC (having not bid on requirements of \$200,000 or more), in which case a duly signed certificate of commitment is attached;
- (d) ☐ is subject to the FCP, and has a valid certificate number as follows: \_\_\_\_\_ (e.g. has not been declared an ineligible contractor by HRSDC.)

Further information on the FCP is available on the HRSDC Web site (<http://www.hrsdc.gc.ca/eng/labour/equality/fcp/index.shtml>).

## 2.2 Former Public Servant Certification

Contracts with former public servants (FPS) in receipt of a pension or of a lump sum payment must bear the closest public scrutiny, and reflect fairness in the spending of public funds. In order to comply with Treasury Board policies and directives on contracts with FPS, bidders must provide the information required below.

### Definitions

For the purposes of this clause,

"former public servant" is any former member of a department as defined in the *Financial Administration Act*, R.S., 1985, c. F-11, a former member of the Canadian Armed Forces or a former member of the Royal Canadian Mounted Police. A former public servant may be:

- (a) an individual;
- (b) an individual who has incorporated;

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

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

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

#### **Former Public Servant in Receipt of a Pension**

Is the Bidder a FPS in receipt of a pension as defined above? **YES ( ) NO ( )**

If so, the Bidder must provide the following information:

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

#### **Work Force Reduction Program**

Is the Bidder a FPS who received a lump sum payment pursuant to the terms of a work force reduction program? **YES ( ) NO ( )**

If so, the Bidder must provide the following information:

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

For all contracts awarded during the lump sum payment period, the total amount of fees that may be paid to a FPS who received a lump sum payment is \$5,000, including the Goods and Services Tax or Harmonized Sales Tax.

#### **Certification**

By submitting a bid, the Bidder certifies that the information submitted by the Bidder in response to the above requirements is accurate and complete.

## **2.3 Canadian Content Certification**

This procurement is limited to Canadian services.

The Bidder certifies that:

( ) the service(s) offered is(are) a Canadian service as defined in paragraph 2 of clause A3050T.

### **2.3.1 SACC Manual clause A3050T (2010-01-11), Canadian Content Definition**

## **2.4 Status and Availability of Resources**

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

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

## **2.5 Education and Experience**

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

## **2.6 Language Capability**

The Bidder certifies that it has the language capability required to perform the Work, as stipulated in the Statement of Work.

Solicitation No. - N° de l'invitation

W7701-135515/A

Amd. No. - N° de la modif.

File No. - N° du dossier

QCL-2-35353

Buyer ID - Id de l'acheteur

qc1002

Client Ref. No. - N° de réf. du client

W7701-135515

CCC No./N° CCC - FMS No/ N° VME

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## **PART 6 - FINANCIAL REQUIREMENTS**

### **1. Financial Capability**

SACC Manual clause A9033T (2011-05-16), Financial Capability

## PART 7 - RESULTING CONTRACT CLAUSES

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

### 1. Statement of Work

The Contractor must perform the Work in accordance with the Statement of Work at Annex \_\_\_\_ and the Contractor's technical bid entitled \_\_\_\_\_, dated \_\_\_\_\_.

#### 1.1 Disclosure Certification

On completion of the Work, the Contractor must submit to the Technical Authority and to the Contracting Authority a copy of the Disclosure Certification attached as Annex C stating that all applicable disclosures were submitted or that there were no disclosures to submit under Section 28 of the general conditions 2040.

### 2. Standard Clauses and Conditions

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

#### 2.1 General Conditions

2040 (2012-07-16)), General Conditions - Research & Development, apply to and form part of the Contract.

**The text under Subsection 4 of Section 52) - Code of Conduct and Certifications of 2040 referenced above is replaced by:**

During the entire period of the Contract, the Contractor must diligently update, by written notice to the Contracting Authority, the list of names of all individuals who are directors of the Contractor whenever there is a change. As well, whenever requested by Canada, the Contractor must provide the corresponding Consent Forms.

#### 2.2 Supplemental General Conditions

The following supplemental general conditions apply to and form part of the Contract:

4002 (2010-08-16), Software Development or Modification Services

#### 2.3 SACC Manual Clauses

K3410C (2008-12-12), Canada to Own Intellectual Property Rights in Foreground Information

K3305C (2008-05-12), License to Intellectual Property Rights in Foreground Information

### 3. Term of Contract

#### 3.1 Period of Contract

The period of the Contract is from date of Contract for a period of 15 months.

### 4. Authorities

#### 4.1 Contracting Authority

The Contracting Authority for the Contract is:

**Aline Brisebois**

Supply Specialist

Public Works and Government Services Canada

Acquisitions and Compensation Directorate

601-1550 D'Estimauville Avenue

Quebec, Quebec

G1J 0C7

Telephone: 418-649-2883

Facsimile: 418-648-2209

E-mail address: [Aline.Brisebois@pwgsc-tpsgc.gc.ca](mailto:Aline.Brisebois@pwgsc-tpsgc.gc.ca)

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

#### 4.2 Technical Authority

The Technical Authority for the Contract is: **(will be insert in the contract)**

Name : \_\_\_\_\_

Title : \_\_\_\_\_

Organization : \_\_\_\_\_

Address : \_\_\_\_\_

Telephone: \_\_\_\_\_

Facsimile: \_\_\_\_\_

E-mail address: \_\_\_\_\_

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



#### 4.3 Contractor's Representative (Will be completed at the time of the contract)

##### Administrative representative :

Name :

Telephone :

Facsimile :

Email :

##### Technical representative :

Name :

Telephone :

Facsimile :

Email :

#### 5. Payment

##### 5.1 Basis of Payment

The Contractor will be reimbursed for the costs reasonably and properly incurred in the performance of the Work, as determined in accordance with the Basis of Payment in Annex B, to a limitation of expenditure of \$\_\_\_\_\_ **(insert the amount at contract award)**. Customs duties are included and Goods and Services Tax or Harmonized Sales Tax is extra, if applicable.

##### 5.2 Limitation of Expenditure

1. Canada's total liability to the Contractor under the Contract must not exceed \$ \_\_\_\_\_ **(amount to be inserted at contract award)** . Customs duties are included and Goods and Services Tax or Harmonized Sales Tax is extra, if applicable.
2. No increase in the total liability of Canada or in the price of the Work resulting from any design changes, modifications or interpretations of the Work, will be authorized or paid to the Contractor unless these design changes, modifications or interpretations have been approved, in writing, by the Contracting Authority before their incorporation into the Work. The Contractor must not perform any work or provide any service that would result in Canada's total liability being exceeded before obtaining the written approval of the Contracting Authority. The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum:
  - (a) when it is 75 percent committed, or
  - (b) four (4) months before the Contract expiry date, or
  - (c) as soon as the Contractor considers that the contract funds provided are inadequate for the completion of the Work,

whichever comes first.
3. If the notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority a written estimate for the additional funds required. Provision of such information by the Contractor does not increase Canada's liability.

### 5.3 Method of Payment

#### 5.3.1 Progress Payments

1. Canada will make progress payments in accordance with the payment provisions of the Contract, no more than once a month, for cost incurred in the performance of the Work up to 90 percent of the amount claimed and approved by Canada if:
  - (a) an accurate and complete claim for payment using form PWGSC-TPSGC 1111 (<http://www.tpsgc-pwgsc.gc.ca/app-acq/forms/documents/1111.pdf>) and any other document required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
  - (b) the amount claimed is in accordance with the Basis of payment;
  - (c) the total amount for all progress payments paid by Canada does not exceed 90 percent of the total amount to be paid under the Contract;
  - (d) all certificates appearing on form PWGSC-TPSGC 1111 have been signed by the respective authorized representatives.
2. The balance of the amount payable will be paid in accordance with the payment provisions of the Contract upon completion and delivery of the item if the Work has been accepted by Canada and a final claim for the payment is submitted.

#### 5.3.2 Funding by Fiscal Year

Despite the Total Estimated Cost (Limitation of Expenditure) specified in the Contract, and unless otherwise authorized in writing by the Contracting Authority, the maximum amount which may be paid for work completed in the period ending 31 March of the year specified is as follows:

Period of 1st April 2012 to 31 March 2013 : \$170 000.00

Period of 1st April 2013 to 31 March 2014 : \$220 000.00

### 5.4 SACC Manual Clauses

A9117C (2007-11-30), T1204 - Direct Request by Customer DepartmentC2000C (2007-11-30), Taxes - Foreign-based Contractor )  
C0305C (2008-05-12), Cost Submission

### 5.5 Discretionary Audit

SACC Manual Clause C0705C (2010-01-11), Discretionary Audit

## 6. Invoicing Instructions - Progress Claim

1. The Contractor must submit a claim for progress payment using form PWGSC-TPSGC 1111 (<http://www.tpsgc-pwgsc.gc.ca/app-acq/forms/documents/1111.pdf>).

Each claim must show:

- (a) all information required on form PWGSC-TPSGC 1111;
- (b) all applicable information detailed under the section entitled "Invoice Submission" of the general conditions;

Each claim must be supported by:

- (a) a copy of time sheets to support the time claimed;
  - (b) a copy of the invoices, receipts, vouchers for all direct expenses, and all travel and living expenses;
  - (c) a copy of the monthly progress report.
2. Goods and Services Tax (GST) or Harmonized Sales Tax (HST), as applicable, must be calculated on the total amount of the claim before the holdback is applied. At the time the holdback is claimed, there will be no GST/HST payable as it was claimed and payable under the previous claims for progress payments.
  3. The Contractor must prepare and certify one original and two (2) copies of the claim on form PWGSC-TPSGC 1111, and forward it to the following address for certification.

**ATTN : Mrs Suzanne Larrivée**

Supply Support Clerk  
Public Works and Government Services Canada  
601-1550 Avenue D'Estimauville  
Québec, Québec  
G1J 0C7

**E-mail address:** [suzanne.larrivee@tpsgc-pwgsc.gc.ca](mailto:suzanne.larrivee@tpsgc-pwgsc.gc.ca)

The Contracting Authority will then forward the original and two (2) copies of the claim to the Technical Authority for certification and onward submission to the Payment Office for the remaining certification and payment action.

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

## 7. Certifications

Compliance with the certifications provided by the Contractor in its bid is a condition of the Contract and subject to verification by Canada during the entire contract period. If the Contractor does not comply with any certification or it is determined that any certification made by the Contractor in its bid is untrue, whether made knowingly or unknowingly, Canada has the right, pursuant to the default provision of the Contract, to terminate the Contract for default.

## **7.1 SACC Manual Clauses**

A3060C (2008-05-12), Canadian Content Certification

## **8. Applicable Laws**

The Contract must be interpreted and governed, and the relations between the parties determined, by the laws in force (to be inserted at contract award.

## **9. Priority of Documents**

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

- (a) the Articles of Agreement;
- (b) the supplemental general conditions 4002 (2010-08-16), Software Development or Modification Services ;
- (c) the general conditions 2040 (2012-07-16), General Conditions - Research & Development, apply to and form part of the Contract.
- (d) Annex A, Statement of Work;
- (e) Annex B, Basis of Payment;
- (f) Annex C, Contractor Disclosure of Foreground Information;
- (g) the Contractor's bid dated \_\_\_\_\_

## **10. Defence Contract**

SACC Manual clause A9006C (2008-05-12), Defence Contract

## **11. Foreign Nationals (Canadian Contractor)**

SACC Manual clause A2000C (2006-06-16), Foreign Nationals (Canadian Contractor)

## **12. Insurance**

SACC Manual clause G1005C (2008-05-12), Insurance

**13. Progress Reports**

1. The Contractor must submit monthly reports, in electronic format, on the progress of the Work, to both the Technical Authority and the Contracting Authority.
2. The progress report must contain three parts:
  - (a) PART 1: The Contractor must answer the following three questions:
    - (i) Is the project on schedule?
    - (ii) Is the project within budget?
    - (iii) Is the project free of any areas of concern in which the assistance or guidance of Canada may be required?

Each negative response must be supported with an explanation.

- (b) PART 2: A narrative report, brief, yet sufficiently detailed to enable the Technical Authority to evaluate the progress of the Work, containing as a minimum:
  - (i) A description of the progress of each task and of the Work as a whole during the period of the report. Sufficient sketches, diagrams, photographs, etc., must be included, if necessary, to describe the progress accomplished.
  - (ii) An explanation of any variation from the work plan.
  - (iii) A description of trips or conferences connected with the Contract during the period of the report.
  - (iv) A description of any major equipment purchased or constructed during the period of the report.

## **ANNEX A STATEMENT OF WORK**

### **1. General**

#### **1.1 Title**

Self Improving Inference Prototype (SIIS) for the Intelligence Preparation of the Battlefield (IPB) and Intelligence Preparation of the Operational Environment (IPOE).

#### **1.2 Objective**

The objectives of the work are:

- The development of a self improving inference prototype to support the IPB/IPOE processes.
- Support the demonstration, validation, and experimentation with the prototype.

#### **1.3 Context/Background**

DRDC Valcartier has undertaken a research and development (R&D) Applied Research Projects (ARP) entitled "Self Improving Inference System (SIIS) to Support the Intelligence Preparation of the Battlefield (IPB) Process".

The main objective of the SIIS project is to produce a prototype of a self improving inference system to support the analysis and sensemaking aspects of the Intelligence Preparation of the Battlefield/Intelligence Preparation of the Operational Environment (IPB/IPOE). This prototype must be capable of learning and improving based on both its current performance and operator feedback.

The objective of the current contract is to develop a self improving inference prototype to support the IPB/IPOE processes. The prototype must be integrated in, and leverage as much of the Intelligence Science and Technology Integration Platform (ISTIP) inference tools as is possible.

##### **1.3.1 Intelligence Science and Technology Integration Platform**

A key aspect of the research activities conducted by the Intelligence and Information (I&I) Section at Defence R&D Canada – Valcartier (DRDC Valcartier) has to do with the development of computer-based tools to support the operators/analysts involved in the activities of the intelligence cycle. A number of individual tools have been developed under different research projects, for various customers in diverse domains (e.g., the domain of countering improvised explosive devices (IEDs), the maritime situation awareness domain etc.). Each tool addresses a specific aspect, such as the semantic analysis and automated annotation of unstructured documents, or the use of rule-based automated reasoning for the generation of alerts to draw the attention of the operators/analysts on some anomalous behavior of some actors in a monitored situation. New tools are also continuously being developed.

From an operational perspective, only providing individual, specific, stovepipe tools is often not the most optimal way to proceed. Some tool integration is also required to create a synergy among them and to facilitate the work of the operators/analysts. In this regard, the I&I Section at DRDC Valcartier has created the ISTIP. The ISTIP is a Service-Oriented Architecture platform for the iterative and incremental development and integration of the innovative, loosely coupled, reusable, composable and interoperable services required to perform tasks in computer-based intelligence support systems. It is composed of more than 25 Web services providing business domain related (Intelligence and Command and Control), entity centric (Business data), utility and core platform services to consumers.

#### 1.3.1.1 Visionary Overarching Interaction Interface Layer for the Analyst

The VOiLA is the Visionary Overarching Interaction Interface Layer for the Analyst. It provides the human-computer interaction front end for the exploitation of the ISTIP services. Its core architecture is based on a Widgets Application Shell (WAS) framework allowing the creation of multiple front end applications from a base application shell. This framework provides the ability to create new front end applications easily, to reuse existing user interface components (mainly widgets) and control services. The control services provide the interoperability layer between VOiLA components and the ISTIP layer.

#### 1.3.2 Intelligence Preparation of the Battlefield/Intelligence Preparation of the Operational Environment

IPB is a continuous and systematic process of analyzing the adversary with existing weather and terrain conditions within a specific geographic environment within the guidelines and tempo of the Operational Planning Process. IPB is conducted to assess adversary capabilities, vulnerabilities and to contribute to the wargaming of likely adversary courses of action versus those of friendly forces. IPB is homework that each echelon must accomplish prior to the initiation of battle. IPB is an important function in developing the battlefield situation. Through IPB, commanders can manoeuvre resources and identify intelligence requirements to ensure the success of the operation. It promotes staff action within the decision making process. IPB consists of four distinct steps:

- ♦ STEP 1—Define the battlefield environment
- ♦ STEP 2—Describe the battlefield effects
- ♦ STEP 3—Evaluate the adversary
- ♦ STEP 4—Determine adversary courses of action (COA)

The first step of IPB, defining the battlefield environment must be completed prior to steps two and three of the IPB process. 'Describe the battlefield effects' and 'Evaluate the adversary', steps two and three may be performed concurrently or in sequence. However, the first three steps of the IPB process must be completed before the G2 can begin step four. 'Determine adversary courses of action' integrates adversary doctrine with the environment as it relates to the mission and the specific battlefield.

IPOE is somewhat similar to IPB, but it considers a wider array of components in order to support the decision making process. The operational environment is the composite of the conditions, circumstances, and influences that affect the employment of the capabilities and bear on the decisions of the commander. Understanding the operational environment is fundamental to identifying the conditions required to achieve objectives; avoiding the effects that may hinder mission accomplishment; and assessing the impact of friendly, adversary, and other actors, as well as the local populace, on the commanders' concept of operations (CONOPS).

## 1.4 **Acronyms**

AR	Automated Reasoning
ARP	Applied Research Project
CF	Canadian Forces
CBR	Case-Based Reasoning
CBRIS	Case-Based reasoning Improvement Service
C-IED	Counter - IED
COIN	Counter-Insurgency
CONOPS	Concepts of Operations
DND	Department of National Defence
DoD	US Department of Defense
DRDC	Defence R&D Canada
FLOCARK	Features, Lanes, Objectives, Canalising ground, Approaches, Rate avenues of approach, Key terrain and vital ground
GFE	Government Furnished Equipment
GFI	Government Furnished Information
GUI	Graphical User Interface
IED	Improvised Explosive Devices
IPB	Intelligence Preparation of the Battlefield
IPOE	Intelligence Preparation of the Operational Environment
ISTIP	Intelligence Science and Technology Integration Platform
MITS	Multi-Intelligence Tool Suite
REST	Representational State Transfer
RFI	Request for Information
RR	Reasoning Requirements
RRI	Reasoning Requirements Inventory



R&D	Research and Development
SOA	Service Oriented Architecture
SOAP	Simple Object Access Protocol
SA	Situation Awareness
SIIS	Self Improving Inference System
SME	Subject Matter Expert
SNA	Social Network Analysis
SNAC	Social Network Analysis in Counter Insurgency
SOTA	State-of-the-Art Study
VOiLA	Visionary Overarching Interaction Interface Layer for Analysis
WAS	Widgets Application Shell

## 2. **APPLICABLE DOCUMENTS (references)**

[1] Dorion, E., Bergeron Guyard A. Measures of Similarity for Command and Control Situation Analysis, ICCRTS 2011, Quebec, Canada, June 2011.

[2] Bergeron Guyard, A., Case-Based Reasoning for Maritime Anomaly Detection, COGNitive systems with Interactive Sensors (COGIS 2010), Crawley, United Kingdom, 22 November 2010.

[3] Bergeron Guyard, A., Roy, J. – Toward Case-Based Reasoning for Maritime Anomaly Detection: A Positioning Paper, The Twelfth IASTED International Conference on Intelligent Systems and Control (ISC 2009), Cambridge, Massachusetts, 2-4 November 2009.

## 3. **SCOPE OF THE WORK**

The Contractor must carry out the necessary work to conduct the activities described in this Statement of Work. The conducted work must lead to the development of a fully functional self-improving inference prototype to support the IPB/IPOE processes, along with demonstration, validation, and experimentation with the prototype.

### 3.1 **TASK 1: Define CBR Situation Templates**

The Contractor must develop CBR templates for various contexts:

- Selection of appropriate features/characteristics for a given context
- Selection of an appropriate representation method for selected features

The definitive list of contexts for which templates will be established in concert with the contractor's CBR expert and IPB specialist, and DRDC Technical Authority. However, to a minimum, the following contexts must be addressed:

- A selection (or combination) of templates matching typical IPB/IPOE relevant documents and products. Such documents and products may include:

- AI, AO Overlays
- Demographic Information
- FLOCARK
- Doctrinal templates
- High value targets list
- Adversary capabilities
- IPB Situation Template
- Event Template
- Event Matrix
- ISTAR Plan

- A context description template depicting the general context an Intelligence analyst evolves in. Such a context includes elements such as:

- Mission Objective
- Role
- Tasks
- Goals
- Location
- Identity
- Time
- Information Space
- State of the user
- User Preferences
- Calendar
- Behavioural Pattern
- Relationships
- Focus of attention
- State of the physical environment
- State of the computing system
- History of user

- A template describing de Operational Environment in detail, its characteristics. This template should describe the various elements present on the battlefield, their position and relevant details.
- A template describing a course of action in detail. This template should describe the various components and steps of a course of action.

Note that, as much as possible, all the templates must be built using the ISTIP "Building Blocks". These include, Situation Ontology Instances, Situational Facts, and Situational Spatial Features.

The work done in this task must be validated by the DRDC Valcartier scientific team.

### **3.2 TASK 2: Define Preliminary Similarity Measures**

For every template developed in the previous task, the Contractor must develop appropriate similarity measures.

For each template, it is first necessary to define an appropriate local similarity measure for every attribute of a given template.

Then one or many global similarity measure, combining the local measures, must be constructed to allow the measurement of similarity for every templates. This global similarity measure must be of a form (geometric, feature-based, structure-based) that is the most suitable for the given template. Appropriate feature selection and weighing will also warrant attention.

It is likely that many measures will be developed for a given template in order to allow comparison with various objectives. For instance, with templates describing the Operational Environment, a similarity measure comparing templates in order to identify similar enemy objectives may not be the same as a similarity measure comparing templates to identify similar enemy leadership.

The work done in this task must be validated by the DRDC Valcartier scientific team.

### **3.3 TASK 3: Choose Relevant Learning Approaches to Support CBR**

There exists different learning approaches to support CBR. Some of them are applied to:

- feature selection,
- The optimization of a weight in similarity measures
- The tuning of local similarity measures

A survey of these approaches must be conducted in order to identify the approached best suited to the tuning and improvement of the similarity measures developed in task 3.2.

The work done in this task must be validated by the DRDC Valcartier scientific team.

### **3.4 TASK 4: Implement Learning Algorithms to support CBR**

Taking into account the approaches identified in task 3.3, a set of appropriate algorithms must be selected (if there exists an available implementation) or developed to allow the implementation of the selected algorithms.

Limited proof-of-concepts implementations of the selected algorithms must be conducted in order to validate that their use is indeed warranted, and worthwhile for their target similarity measure.

The work from tasks 3.1 to 3.4 must be documented in a report detailing the results, findings, and decisions made by the contracting team. This report must be validated by the DRDC Valcartier scientific team before further work is conducted.

### 3.5 **TASK 5: Develop Self-Improving Inference Prototype.**

Based on the findings of the previous tasks, the Contractor must develop a self-improving inference system. The prototype must be integrated in, and leverage as much of the Intelligence Science and Technology Integration Platform (ISTIP) and Visionary Overarching Interaction Interface Layer for Analysis (VOiLA) as is possible.

#### 3.5.1 Developement Planning

##### a) Produce a Requirement Elicitation Document

The Contractor must produce a document, clearly stating the foreseen goals and functionalities of the prototype. Specifically, the document must:

Rely on a predefined, and agreed upon software development standard, Identify, using proper representation:

- o General, objective driven requirements.
- o Functional requirements.
- o Performance and usability requirements.

##### b) Design, architecture, and development plan documents

The contractor must produce a document, clearly stating the intended development strategy of the prototype and the approaches to be used. The document must include a strategy to:

- identify, using proper representation, the planned design and architecture of the prototype.
- describe the prototype test plan.
- include a strategy and plan to reuse legacy DRDC inference software,
- include a strategy and plan to adapt existing services,
- include a strategy and plan to develop new services,
- include a strategy and plan to integrate the overall prototype into the ISTIP.
- include a strategy and plan to potentially reuse other software components (e.g., libraries, COTS, GUI solution, GIS solution)

The proposed design, architecture, and development plan must be compliant with the SOA approach employed in the ISTIP. The design, architecture, and development plans must be validated by the DRDC Valcartier scientific team.

##### c) Scientific Approach

As part of the architecture documentation, complimentary information on the fashion in which the algorithms identified in task 4 function in the prototype must be provided. At a minimum, the following information must be provided:

- List and description of all the configuration parameters of the implemented algorithms with the specific impact that they have on the inference mechanism.
- A description of the way the algorithm works.
- List of the expected results that should be obtained from the correct execution of the algorithms mechanism when using the demonstration dataset.

As some of the development tasks are iterative and incremental, it is likely that the planning documentation will have to be updated over the contract duration.

### 3.5.2 Develop CBR Service

The Contractor must conduct a careful study of the existing CBR service developed by DRDC Valcartier. The CBR service must be analysed in order to assess if it is able to handle all the required templates and similarity measures identified in previous tasks.

Once that study is conducted, a plan must be produced to provide a service that will be able to handle all the required templates and similarity measures identified in previous tasks. The decision whether to build a new service, or to modify the existing one must be made and validated by DRDC Valcartier scientific team.

The Contractor must develop a SOA CBR Web service in accordance to the plan validated by the DRDC Valcartier scientific team.

### 3.5.3 Develop CBR Improvement Service

The Contractor must develop a SOA CBR improvement service (CBRIS) using a Web service development approach (SOAP or REST based). Based on the results provided by the CBR service, and on a certain feedback provided as input, the CBRIS must be able to apply the algorithms identified in tasks 3 and 4 in order to improve the CBR service's performance.

### 3.5.4 Develop Graphical User Interface Components

The Contractor must develop a GUI that fully supports the services developed. The GUI must leverage as much of Visionary Overarching Interaction Interface Layer for Analysis (VOiILA), and other existing UI components as is possible.

The GUI functionalities must include, but are not restricted to allowing the user to:

- Fill the templates developed in task 1 in an appropriate fashion. This implies that if a particular template aims at describing the geographical Operational Environment on a map display, the user must be provided a map.

- Visualise, specify and modify the similarity measures developed in task 2.
- Validate the results from the CBR analysis in the appropriate format, best suited for validation. This implies that if a given template and similarity measure compare situations on a map, the user should be able to visualise the new situation alongside the situations retrieved from the Case-Base in order to validate the similarity.
- Provide feedback on the results of the CBR service. Depending on the learning approached selected, it is very likely that user feedback will be required for the learning. For every type of template and similarity measure used, it essential to provide such interactive visual support to the user.
- Fully Configure the CBR service. This implies giving the user the capacity to visualise and modify all of the service's parameters and configurations.
- Fully configure the CBRIS service. This implies giving the user the capacity to visualise and modify all of the service's parameters and configurations.

### **3.6 TASK 6: Demonstration and Validation**

The Contractor must prepare a complete demonstration of the final version of the prototype deployed onsite at DRDC Valcartier within the Intelligence and Information section's IT ecosystem. The demonstration is to be held for the Technical Authority and other DND/DRDC representatives. The demonstration must clearly illustrate the prototype's use and functionalities.

A scenario and appropriate set of data must be gathered or produced to support the demonstration of the developed components. The contractor must:

- Create a demonstration scenario (vignette) for the implemented component that illustrates the complete behavior of the implemented mechanism and highlights its purpose.
- Create a dataset corresponding to the demonstration scenario and prototype data requirements, which can be used to validate the expected behavior of the implemented mechanisms.
- Prepare and package the prototype for participation in experimentation.

Note that the dataset aspect of this task will probably have to be conducted before prior tasks, as the produced/found data will be necessary for the planning and development of the prototype.

### **3.7 TASK 7: Project Management**

#### **3.7.1 Software Engineering Process**

All the software engineering related tasks performed under this contract must follow an agile software engineering process, Scrum being a candidate of choice. The process enforced must be iterative, incremental, and must focus at delivering working increments of the software throughout the realization of the project's sprints or iterations.

### 3.7.2 Kick-off Meeting

The Contractor must prepare for and attend a kick-off meeting with the Technical Authority. This kick-off meeting will be held within a week of the contract award. The kick-off meeting should be held at DRDC Valcartier but for logistical reasons it may be held at the contractor facilities. The Technical Authority will confirm the location of this meeting at least 24 hours before that date of the meeting. The Contractor must prepare the minutes and action log. Meeting minutes must be delivered within 5 business days of the meeting. The meeting agenda must include at a minimum, the following items:

- Review of the contract objectives
- Methodology used to execute the work and monitor the project plan
- Procedures, formats and standards to be used to produce documentation
- Financial management
- Contingency plan for replacement of personnel resources.

### 3.7.3 Progress Review Meetings

A progress review meeting will be held every month throughout the contract with the Technical Authority. The Contractor must prepare the agenda, the minutes and action documents for all these meetings. Each progress review meeting must cover at least the following items:

- Progress report by Contractor (results, problems, documentation, etc.)
- Project management report by Contractor (financial & manpower)

Contractor's work plan for the next period (overview of the expected progress and the challenges for the upcoming period).

Face-to-face meetings at DRDC Valcartier should be privileged for the progress review meetings, although video-teleconference could be used as a complementary communication channel. Informal meetings and communications are encouraged and may be held at any time to discuss and resolve specific issues. An agenda for progress review meetings must be produced at least 24h before the meeting. Meeting minutes must be delivered within 5 business days of the meeting.

### 3.7.4 Working Meetings

When required, interaction will take place between the Technical Authority and the Contractor to discuss specific aspects of the project. Meetings could be held at DRDC Valcartier or by teleconference, as dictated by the situation, and previously agreed upon by the Contractor and the Technical Authority.

### 3.7.5 Contract Conclusion Meeting

The Contractor must prepare for and attend the contract conclusion meeting, at DRDC Valcartier. The Contractor must give a formal presentation to DRDC scientists and military SMEs presenting the outcome and findings of this contract. Prior to the presentation, a draft version of the presentation must be provided in an electronic format (Microsoft PowerPoint) to the Technical Authority for his review. Following the presentation, a compilation of all stakeholder feedback must be integrated in an updated version of the final presentation which should be delivered within a week of the final presentation.

## 4. **REPORTS AND OTHER DELIVERABLES**

### 4.1 Reports and other deliverables

The Contractor is responsible for the following deliverables:

Tasks	Description	Deliverables	Deadlines
1 to 4	CBR Study	Template, Similarity, Algorithmic and Proof of concept report.	5 months after contract award.
5	Development Planning	Prototype development plan, Requirement, Design and Architecture documents.	6 months after contract award.
5	Prototype Development	Integrated (ISTIP) Prototype	14 months after contract award.
		Source Code	
		Implemented Algorithm Description Document	
		Installation Guide	
		User Guide	
		Test Procedures, datasets, results	
6	Demonstration, Validation, and Experimentation	Scenario	1 month before the end of the contract period.
		Supporting Data	Final version 1 month before the end of the contract period. Continuous process: evolving over project period.
7	Project Management	Kick-off meeting	1 week after contract award.
		Progress Review Meetings and Reports	Every month after contract award. As needed.
		Contract Conclusion Presentation	2 weeks before the end of the contract period.
		Updated Final	1 week after final



All reports (and other documents) must be prepared in English and must be formatted in accordance with DRDC standards. The standards can be obtained, upon contract award, through the Technical Authority. All documents produced by the Contractor must bear the appropriate security classification and copyright statement.

Draft versions of deliverables must be provided to the Technical Authority for review at least five working days before the related completed tasks. The final draft versions of each report must be delivered to the Technical Authority according to the Delivery Calendar (above). The Technical Authority will review the final draft version of these reports within ten (10) working days from its reception in order to provide comments to the Contractor for producing the final version of the respective reports. All deliverables must be clearly identified in soft and hard copies. At the end of the contract, all deliverables must be delivered in 5 CD copies (in both Microsoft® Word 2003 and Adobe® Acrobat 7.0 PDF format) and 3 bounded double-sided hardcopies.

#### 4.2 Publications

Any manuscript for publication in magazines, scientific journals or other publications, as well as any abstract of an oral presentation or any other form of public disclosure must first be submitted to the Technical Authorities for approval ninety (90) days in advance of presentation or publication. An explicit reference to Canada funding must be mentioned in a statement indicating that the content is exclusively the responsibility of the authors. The Technical Authority will provide a written objection if there are any specific elements (e.g., audience) falling outside the best interests of Canada.

#### 5. GOVERNMENT SUPPLIED MATERIAL (GSM)

The Technical Authority will provide background information on the IPB/IPOE process, on the ISTIP, VOiIA upon contract award. All the available ISTIP documentation will be provided. This includes the available Design and Development guidelines, the Architecture Vision, as well as all the needed service description (both user and developer documentation).

If additional technical documents (property of the Government) are required for this work, they will be made available to the contractor upon the Technical Authority approval and subject to distribution restriction. The contractor is required to keep track of all furnished documents and must return them to the Technical Authority upon work completion.

6. GOVERNMENT FURNISHED EQUIPMENT (GFE) (in French – EFG – Équipement fourni par le gouvernement)

It is not expected that any equipment will be provided to the Contractor

7. WORK LOCATION

Most of the work of this contract must be performed at the contractor facilities. . The Contractor may have to perform some development/support tasks onsite at DRDC Valcartier (2459 boul. Pie XI Nord | 2459 Pie-XI Blvd North Québec, QC, Canada, G3J 1X5). Arrangements concerning the synchronization of source code will be made at the kick off meeting. Most of the Meetings and the final demonstrat to be held at DRDC Valcartier

**ANNEX B****BASIS OF PAYMENT**

1. **LABOUR:** at the following firm rates, GST/HVT extra.

Proposed Resources	Firm Hourly Rate Proposed Contract Period				Extended Total per Resource
	Date of Award to 31 March 2013	Total Est. Hours	1 April 2013 to 30 January 2014	Total Est. Hours	
		\$		\$	\$
		\$		\$	\$
		\$		\$	\$
		\$		\$	\$
		\$		\$	\$
		\$		\$	\$
		\$		\$	\$

Est.: \$ \_\_\_\_\_

2. **EQUIPMENT:** at laid down cost without markup

Est.: \$ \_\_\_\_\_

3. **RENTALS:** at actual cost without markup

Est.: \$ \_\_\_\_\_

4. **MATERIALS AND SUPPLIES:** at laid down cost without markup

Est.: \$ \_\_\_\_\_

5. **TRAVEL AND LIVING EXPENSES:**

The Contractor will be reimbursed its authorized travel and living expenses reasonably and properly incurred in the performance of the Work, at cost, without any allowance for profit and/or administrative overhead, in accordance with the meal, private vehicle and incidental expenses provided in Appendices B, C and D of the Treasury Board Travel Directive ([http://www.tbs-sct.gc.ca/pubs\\_pol/hrpubs/TBM\\_113/td-dv\\_e.asp](http://www.tbs-sct.gc.ca/pubs_pol/hrpubs/TBM_113/td-dv_e.asp)), and with the other provisions of the directive referring to "travellers", rather than those referring to "employees" are applicable. All travel must have prior authorization of the Technical Authority. All payments are subject to government audit.

Est.: \$ \_\_\_\_\_

Solicitation No. - N° de l'invitation

W7701-135515/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur

qc1002

Client Ref. No. - N° de réf. du client

File No. - N° du dossier

CCC No./N° CCC - FMS No/ N° VME

W7701-135515

QCL-2-35353

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6. **SUBCONTRACTS:** at actual cost without markup **Est.: \$ \_\_\_\_\_**

7. **OTHER DIRECT CHARGES:** at actual cost without markup **Est.: \$ \_\_\_\_\_**

**Estimated Cost to a Limitation of Expenditure: \$ \_\_\_\_\_**  
**(GST/HST extra)**

With the exception of the firm rate(s) and price(s), the amounts shown in the various items specified above are estimates only. Minor changes to these estimates will be accepted for billing purposes as the Work proceeds, provided that these changes have the prior approval of the Technical Authority, and provided that the estimated cost does not exceed the aforementioned Limitation of Expenditure.

**ANNEX "C"****CONTRACTOR DISCLOSURE OF FOREGROUND INFORMATION**

Please see reference applicable in your contract to look into **Article 1 - Interpretation of 2040 General Conditions** to obtain the complete definition of the term Foreground Information and thus to help you to determine the information which must be revealed. <http://sacc.pwgsc.gc.ca/sacc/query-e.jsp>.

The Contractor shall respond to the following questions:

1. Contract No.:
2. What is the descriptive title of the FIP (Foreground Intellectual Property)?
3. Abbreviated description of the FIP and, if applicable, of the different systems and sub-systems.
4. What is or was the objective of the project?
5. Explain how the FIP meets the objective of the project (for example: the advantage of the new solution, what problem did the FIP resolve or what benefits did the FIP deliver).
6. Under which category (ies) would you best describe the FIP and why: Patents, Inventions, Trade Secrets, Copyright, Industrial Designs, Rights in Integrated Circuit Topography, Know-how, Other?
7. Describe the features or aspects of the FIP that are novel, useful and not obvious.
8. Has the FIP been tested or demonstrated? If yes, please summarise the results.
9. Has any publication or disclosure to others been made? If so, to whom, when, where and how?
10. Provide names and addresses of the inventors.
11. Provide an explicit and detailed description of the FIP developed during the contract (Refer to pertinent section of the technical report, if necessary).

Please specify name and position of person approving / authorizing this disclosure. This person is to sign and date the disclosure.

Signature

Date

Name

Title

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(Internal DRDC Valcartier)

Signature

Date

Name

Title (Technical authority)