

**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> iVAC / AVR	
<b>Solicitation No. - N° de l'invitation</b> W7701-135551/A	<b>Date</b> 2013-01-14
<b>Client Reference No. - N° de référence du client</b> W7701-13-5551	
<b>GETS Reference No. - N° de référence de SEAG</b> PW-\$QCL-032-15145	
<b>File No. - N° de dossier</b> QCL-2-35475 (032)	<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 2013-01-30</b>	<b>Time Zone</b> <b>Fuseau horaire</b> Heure Normale du l'Est HNE
<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> Boudrias, Marie-M.	<b>Buyer Id - Id de l'acheteur</b> qcl032
<b>Telephone No. - N° de téléphone</b> (418) 649-2806 ( )	<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 DÉFENSE CANADA VALCARTIER 2459 BLVD PIE XI NORD QUEBEC Québec G3J1X5 Canada	

**Instructions: See Herein**

**Instructions: Voir aux présentes**

**Vendor/Firm Name and Address**

**Raison sociale et adresse du  
fournisseur/de l'entrepreneur**

**Issuing Office - Bureau de distribution**

TPSGC/PWGSC  
601-1550, Avenue d'Estimauville  
Québec  
Québec  
G1J 0C7

<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/ de l'entrepreneur (taper ou écrire en caractères d'imprimerie)</b>	
<b>Signature</b>	<b>Date</b>

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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, and the basis of selection;
- Part 5 Certifications: includes the certifications to be provided;
- Part 6 Financial Requirements: includes specific requirements that must be addressed by bidders; and
- Part 7 Resulting Contract Clauses: includes the clauses and conditions that will apply to any resulting contract.

The Annexes include the Statement of Work (annex A), the Basis of Payment (annex B) and the Contractor Disclosure of Foreground Information form (annex C).

### 2. Summary

**(a) Title :** Intelligence Virtual Analyst Capability (iVAC) - Framework and Components.

**(b) Objective :**

The objectives of the work are:

- The development of a technological framework for the iVAC, and
- the development of analysis components to be deployed on the framework.

The Contractor must carry out the necessary work to conduct the activities described in this Statement of Work (annex A). The conducted work must lead to the development of a technological framework for the iVAC, as well as to the development of virtual analyst components, to be de-ployed on this framework.

**(c) Maximum funding:**

The maximum funding available for the contract resulting from the bid solicitation is \$234,500.00 CAD (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.

**(d) Basis for Canada's Ownership of Intellectual Property:**

Canada has determined that any intellectual property rights arising from the performance of the Work under the resulting contract will belong to Canada.

**(e) Contract period:**

The period of the contract is from the date of the contract to March 31, 2014.

**(f) Client Department:**

The work will be performed for Defense Research and Development Canada, Valcartier (DRDC-Valcartier).

**(g) Other information :**

- There is no security requirement associated with this requirement.
- The requirement is subject to the provisions of the Agreement on Internal Trade (AIT).
- The requirement is limited to Canadian goods and/or services.

**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.

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## 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 Manual*

(<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-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 (2012-11-19) Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation.

#### 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 or e-mail to PWGSC will not be accepted.

### 3. Enquiries - Bid Solicitation

All enquiries must be submitted in writing to the Contracting Authority no later than five (5) 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**

Canada has determined that any intellectual property rights arising from the performance of the Work under the resulting contract will belong to Canada on the following grounds:

*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 \$234,500.00 CAD (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.

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## 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 or DVD)
- Section II : Financial Bid (1 hard copy)
- 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; and
- (b) use a numbering system that corresponds to the bid solicitation.

In April 2006, Canada issued a policy directing federal departments and agencies to take the necessary steps to incorporate environmental considerations into the procurement process [Policy on Green Procurement](http://www.tpsgc-pwgsc.gc.ca/ecologisation-greening/achats-procurement/politique-policy-eng.html) (<http://www.tpsgc-pwgsc.gc.ca/ecologisation-greening/achats-procurement/politique-policy-eng.html>). To assist Canada in reaching its objectives, bidders should:

- (1) use paper containing fibre certified as originating from a sustainably-managed forest and containing minimum 30% recycled content; and
- (2) use an environmentally-preferable format including black and white printing instead of colour printing, print double sided/duplex, using staples or clips instead of cerlox, duotangs or 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 (see attachment 2 - Point Rated Technical Criteria). 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.

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## **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 at Attachment 1.**
- (b) 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.

## **Section III: Certifications**

Bidders must submit the certifications required under Part 5.

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## **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.

#### **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.

##### **1.1.1 Point Rated Technical Criteria**

Refer to Attachment 2, Point Rated Technical Criteria.

#### **1.2 Financial Evaluation**

##### **1.2.1 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.

The financial evaluation will be conducted by calculating the Total Cost to a Limitation of Expenditure using the attachment 1, Financial Bid Presentation Sheet completed by the bidder.

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## 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 criterion 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.

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## PART 5 - CERTIFICATIONS

Bidders must provide the required certifications and related documentation to be awarded a contract. Canada will declare a bid non-responsive if the required certifications and related documentation 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 to provide the related documentation or to comply with the request of the Contracting Authority for additional information will also render the bid non-responsive.

### 1. Mandatory Certifications Required Precedent to Contract Award

#### 1.1 Code of Conduct and Certifications - Related documentation

- 1.1.1 By submitting a bid, the Bidder certifies, for himself and his affiliates, to be in compliance with the Code of Conduct and Certifications clause of the Standard instructions. The related documentation hereinafter mentioned will help Canada in confirming that the certifications are true. By submitting a bid, the Bidder certifies that it is aware, and that its affiliates are aware, that Canada may request additional information, certifications, consent forms and other evidentiary elements proving identity or eligibility. Canada may also verify the information provided by the Bidder, including the information relating to the acts or convictions specified herein, through independent research, use of any government resources or by contacting third parties. Canada will declare non-responsive any bid in respect of which the information requested is missing or inaccurate, or in respect of which the information contained in the certifications is found to be untrue, in any respect, by Canada. The Bidder and any of the Bidder's affiliates, will also be required to remain free and clear of any acts or convictions specified herein during the period of any contract arising from this bid solicitation.

Bidders who are incorporated, including those bidding as a joint venture, must provide with their bid or promptly thereafter a complete list of names of all individuals who are currently directors of the Bidder. Bidders bidding as sole proprietorship, including those bidding as a joint venture, must provide the name of the owner with their bid or promptly thereafter. Bidders bidding as societies, firms, partnerships or associations of persons do not need to provide lists of names. If the required names have 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 comply will render the bid non-responsive. Providing the required names is a mandatory requirement for 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) (<http://www.tpsgc-pwgsc.gc.ca/app-acq/forms/formulaires-forms-eng.html>) for any or all individuals aforementioned within the time specified. Failure to provide such Consent Forms within the time period provided will result in the bid being declared non-responsive.

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## **2. Additional Certifications Precedent to Contract Award**

The certifications in Attachment 3, Certifications Precedent to Contract Award, 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.

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## **PART 6 - FINANCIAL REQUIREMENTS**

### **1. Financial Capability**

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

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## 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 A and the Contractor's technical bid entitled \_\_\_\_\_, dated \_\_\_\_\_ (to be completed by Canada at the contract award).

### 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 Manual (<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 (2012-11-19), General Conditions - Research & Development, apply to and form part of the Contract.

#### 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

### 3. Term of Contract

#### 3.1 Period of Contract

The period of the Contract is from date of Contract to March 31, 2014 inclusive.

**4. Authorities**

**4.1 Contracting Authority**

The Contracting Authority for the Contract is:

Marie-Michèle Boudrias  
Supply Officer  
Public Works and Government Services Canada  
1550, d'Estimauville Avenue  
Quebec city, Quebec, G1J 0C7

Telephone: 418-649-2806  
Facsimile: 418-648-2209  
E-mail address: marie-michele.boudrias@tpsgc-pwgsc.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 (to be completed by Canada at the contract award)**

The Technical Authority for the Contract is:

Name : \_\_\_\_\_  
Organization : \_\_\_\_\_  
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 (to be completed by the bidder)**

**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.

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## 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 all work required under the Contract if the Work has been accepted by Canada and a final claim for the payment is submitted.
3. Progress payments are interim payments only. Canada may conduct a government audit and interim time and cost verifications and reserves the right to make adjustments to the Contract from time to time during the performance of the Work. Any overpayment resulting from progress payments or otherwise must be refunded promptly to Canada.

### 5.4 SACC Manual Clauses

A9117C (2007-11-30), T1204 - Direct Request by Customer Department  
C0305C (2008-05-12), Cost Submission

### 5.5 Discretionary Audit

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

### 5.6 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 from the contract award to March 31, 2013:	\$34,500.00
Period from April 1st, 2013 to the end of the contract period:	\$200,000.00.

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## 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;
- (c) a list of all expenses;

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 : Olfa Ben Mahmoud**

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

**E-mail address** : [olfa.benmahmoud@tpsgc-pwgsc.gc.ca](mailto:olfa.benmahmoud@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.

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## 7. Certifications

### 7.1 Compliance

Compliance with the certifications and related documentation 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, provide the related documentation or if 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.

### 7.2 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 in \_\_\_\_\_ (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 (2008-05-12), Software Development or Modification Services;
- (c) the general conditions 2040 (2012-11-19), General Conditions - Research & Development;
- (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 \_\_\_\_\_ (insert date of bid)

## 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)

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**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 two 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.

**14. Site Regulations**

The Contractor must comply with all standing orders or other regulations, instructions and directives in force on the site where the Work is performed.

**15. Identification Badge**

SACC Manual clause A9065C (2006-06-16) Identification Badge

## ATTACHMENT 1

### FINANCIAL BID PRESENTATION SHEET

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

#### **INSTRUCTIONS:**

- 1.1 Bidders are requested to bid one rate per proposed labour category, for the contract period. **Each labour category that will be involved in the project must be identified in the table below.**
- 1.2 Bidders are only requested to identify the name of each of the following resource proposed to comply with the point rated technical criteria of section 3. Experience and knowledge of resources directly involved in the project (see attachment 2 - Point rated technical criteria) :
- (i) the proposed ML SME that will work the greatest amount of hours on this projet (1 resource),
  - (ii) the proposed CBR SME that will work the greatest amount of hours on this projet (1 resource),
  - (iii) the two resources that will work the greatest amount of hours on the GUI development tasks (if only one resource is required to perform the GUI development tasks, the bidder should identify only one resource),
  - (iv) the two resources that will work the greatest amount of hours on the software development tasks (if only one resource is required to perform the software development tasks, the bidder should identify only one resource),
  - (v) the two resources that will work the greatest amount of hours on the software integration tasks (if only one resource is required to perform the software integration tasks, the bidder should identify only one resource),
- The other resources that will be involved in the project may not be identified with their name.
- 1.3 If the resource works for a subcontractor, the Bidders are requested to identify the name of the subcontractor.
- 1.4 If necessary, the Bidders may insert more or less lines in the table below.

A Labour Categories	B Firm Hourly Rate for the entire contract period	C Total estimated number of hours	D Extended Total per Labour Category (B X C)
Labour Category :  _____	\$ _____ / hour	_____ hours	\$ _____
Name of the proposed resource (if applicable - please refer to instruction 1.2):  _____			

<b>A</b> <b>Labour Categories</b>	<b>B</b> <b>Firm Hourly Rate for the entire contract period</b>	<b>C</b> <b>Total estimated number of hours</b>	<b>D</b> <b>Extended Total per Labour Category (B X C)</b>
Labour Category : _____ Name of the proposed resource (if applicable - please refer to instruction 1.2): _____	\$_____ / hour	_____ hours	\$_____
Labour Category : _____ Name of the proposed resource (if applicable only - please refer to instruction 1.2): _____	\$_____ / hour	_____ hours	\$_____
Labour Category : _____ Name of the proposed resource (if applicable - please refer to instruction 1.2): _____	\$_____ / hour	_____ hours	\$_____
Labour Category : _____ Name of the proposed resource (if applicable - please refer to instruction 1.2): _____	\$_____ / hour	_____ 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
(a)	\$ _____
(b)	\$ _____

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

3. RENTALS: at actual cost without markup

Description	Price
(a)	\$ _____
(b)	\$ _____

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

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

Description	Price
(a)	\$ _____
(b)	\$ _____

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.

*N.B.: The subcontractor's resources that are proposed by the bidder must be included in the table of section 1 and are subject to the provision of section 1, Labour.*

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

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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 & LIVING: \$ \_\_\_\_\_

7. OTHER DIRECT CHARGES: at actual cost without markup

**Details are to be provided on a separate sheet.**

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

**TOTAL ESTIMATED COST TO A LIMITATION OF EXPENDITURE: \$ \_\_\_\_\_  
(GST/HST extra)**

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## **ATTACHMENT 2**

### **POINT RATED TECHNICAL CRITERIA**

The document entitled "Point rated technical criteria" appended to the bid solicitation package is to be inserted at this point and forms part of this document

## ATTACHMENT 3

### CERTIFICATIONS PRECEDENT TO CONTRACT AWARD

#### 1. Federal Contractors Program for Employment Equity - Certification

##### 1.1 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. Former Public Servant - Competitive Requirements

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, 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

As per the above definitions, is the Bidder a FPS in receipt of a pension?

YES ( ) NO ( )

If so, the Bidder must provide the following information, for all FPS in receipt of a pension, as applicable:

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

By providing this information, Bidders agree that the successful Bidder's status, with respect to being a former public servant in receipt of a pension, will be reported on departmental websites as part of the published proactive disclosure reports in accordance with Contracting Policy Notice: 2012-2 and the Guidelines on the Proactive Disclosure of Contracts.

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## 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.

### 3. Canadian Content Certification

This procurement is limited to Canadian goods and Canadian services.

The Bidder certifies that:

- ( ) a minimum of 80 percent of the total bid price consist of Canadian goods and Canadian services as defined in paragraph 5 of clause A3050T.

For more information on how to determine the Canadian content for a mix of goods, a mix of services or a mix of goods and services, consult Annex 3.6.(9), Example 2, of the Supply Manual. (<https://buyandsell.gc.ca/policy-and-guidelines/supply-manual/annex/3/6>)

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

#### **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.

#### **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.

#### **6. Language Capability**

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

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## **ANNEX A**

### **STATEMENT OF WORK**

The document entitled "Statement of Work" appended to the bid solicitation package is to be inserted at this point and forms part of this document

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## ANNEX B

### BASIS OF PAYMENT

*(To be compiled by Canada at the contract award.)*

*N.B.: The Basis of Payment will be in accordance with the financial bid presentation sheet (attachment 1) completed by the Bidder and the following paragraph will be inserted at the end of the Basis of Payment :*

“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

-----  
(Internal DRDC Valcartier)

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title (Technical authority)

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### Point rated technical criteria

Point rated technical criteria	Evaluation Scale	Max	Min
<p><b>1. TECHNICAL PROPOSAL / STRATEGY, APPROACH, METHODOLOGY</b></p> <p><b>Point(s) between 0 and the maximum will be attributed for each criterion of this section (in accordance with the evaluation scale).</b></p> <p><b>1.1 - Degree of understanding of context, scope and objectives</b></p> <p>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.</p> <p>The required elements for this criterion are:</p> <ol style="list-style-type: none"> <li>a. There is a brief introduction.</li> <li>b. There is a concise evaluation of: <ol style="list-style-type: none"> <li>i. the project needs,</li> <li>ii. the objectives of the proposed work,</li> <li>iii. the reasons that justify the conduct of the work as proposed.</li> </ol> </li> <li>c. The text is concise,</li> <li>d. The text is clear and easy to understand.</li> </ol>	<p>10 pts: Excellent understanding of context, scope and objectives demonstrated. All required elements are there. Understanding is beyond expectations.</p> <p>8 pts: Very good understanding of context, scope and objectives demonstrated. All required elements are there. The text is concise without confusion</p> <p>6 pts: Good understanding of context, scope and objectives demonstrated. All required elements are there. The text is relatively concise, without major confusion.</p> <p>4 pts: Average understanding of context, scope and objectives demonstrated. The text is either not concise enough, or it presents important confusion.</p> <p>2 pts: Poor understanding of context, scope and objectives demonstrated. Many required elements are missing. The text is not concise enough, presents important confusion.</p> <p>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.</p>	30	18
		10	NA

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### Point rated technical criteria

Point rated technical criteria	Evaluation Scale	Max	Min
<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	NA

### Point rated technical criteria

Point rated technical criteria	Evaluation Scale	Max	Min
<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. 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	NA

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### Point rated technical criteria

Point rated technical criteria	Evaluation Scale	Max	Min
<b>2. TECHNICAL PROPOSAL / DEMONSTRATION OF KNOWLEDGE</b>		15	8
<b>2.1 - Expertise in Machine Learning (ML)</b> In 3 pages or less, the bidder should demonstrate its knowledge of ML in its own words. It should discuss the elements of ML in the specific context of this project.	<p>5 pts: Excellent knowledge of ML demonstrated. All aspects of ML are clearly discussed in the specific context of the contract.</p> <p>4 pts: Very good knowledge of ML demonstrated. Almost all aspects of ML are clearly discussed in the specific context of the contract.</p> <p>3 pts: Good knowledge of ML demonstrated. Most aspects of ML are clearly discussed in the specific context of the contract.</p> <p>2 pts: Average knowledge of ML demonstrated. Some aspects of ML are clearly discussed in the specific context of the contract.</p> <p>1 pt: Poor knowledge of ML demonstrated. Few aspects of ML are clearly discussed in the specific context of the contract.</p> <p>0 pt: Very poor knowledge of ML demonstrated. Almost no aspects of ML are clearly discussed in the specific context of the contract.</p>	5	NA

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File No. - N° du dossier  
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CCC No./N° CCC - FMS No./N° VME

### Point rated technical criteria

Point rated technical criteria	Evaluation Scale	Max	Min
<b>2.2 - Expertise in Case-Based Reasoning (CBR)</b> In 3 pages or less, the bidder should demonstrate its knowledge of CBR in its own words. It should discuss the elements of CBR in the specific context of this project.	5 pts: Excellent knowledge of CBR demonstrated. All aspects of CBR are clearly discussed in the specific context of the contract. 4 pts: Very good knowledge of CBR demonstrated. Almost all aspects of CBR are clearly discussed in the specific context of the contract. 3 pts: Good knowledge of CBR demonstrated. Most aspects of CBR are clearly discussed in the specific context of the contract. 2 pts: Average knowledge of CBR demonstrated. Some aspects of CBR are clearly discussed in the specific context of the contract. 1 pt: Poor knowledge of CBR demonstrated. Few aspects of CBR are clearly discussed in the specific context of the contract. 0 pt: Very Poor knowledge of CBR demonstrated. Almost no aspects of CBR are clearly discussed in the specific context of the contract.	5	NA
<b>2.3 - Expertise in Intelligent Software Assistant Technologies (ISA)</b> In 3 pages or less, the bidder should demonstrate its knowledge of ISA in its own words. It should discuss the elements of ISA in the specific context of this project. Relevance of highlighted ISA aspects with connection to the project and its tasks will also be evaluated.	5 pts: Excellent knowledge of ISA demonstrated. All aspects of ISA are clearly discussed in the specific context of the contract. 4 pts: Very good knowledge of ISA demonstrated. Almost all aspects of ISA are clearly discussed in the specific context of the contract. 3 pts: Good knowledge of ISA demonstrated. Most aspects of ISA are clearly discussed in the specific context of the contract. 2 pts: Average knowledge of ISA demonstrated. Some aspects of ISA are clearly discussed in the specific context of the contract.	5	NA

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### Point rated technical criteria

Point rated technical criteria	Evaluation Scale	Max	Min
	<p>1 pt: Poor knowledge of ISA demonstrated. Few aspects of ISA are clearly discussed in the specific context of the contract.</p> <p>0 pt: Very poor knowledge of ISA demonstrated. Almost no aspects of ISA are clearly discussed in the specific context of the contract.</p>		
<b>3. EXPERIENCE AND KNOWLEDGE OF RESOURCES DIRECTLY INVOLVED IN THE PROJECT</b>			
	<p>In order to properly evaluate the proposed resources for the criteria of this section, the bidder should clearly identify :</p> <p>(a) the proposed ML SME that will work the greatest amount of hours on this project (1 resource),</p> <p>(b) the proposed CBR SME that will work the greatest amount of hours on this project (1 resource),</p> <p>(c) the two resources that will work the greatest amount of hours on the GUI development tasks and identify which of the two resources is the prime resource (if only one resource is required to perform the GUI development tasks, the bidder should identify only one resource),</p> <p>(d) the two resources that will work the greatest amount of hours on the software development tasks and identify which of the two resources is the prime resource (if only one resource is required to perform the software development tasks, the bidder should identify only one resource),</p> <p>(e) the two resources that will work the greatest amount of hours on the software integration tasks and identify which of the two resources is the prime resource (if only one resource is required to perform the software integration tasks, the bidder should identify only one resource),</p> <p>The bidder should include with its bid the Resume of each of the identified resource.</p>	300	180

\*Note: The prime resource is the resource from a labour category with the greatest amount of hours working on specific tasks of this project.

### Point rated technical criteria

Point rated technical criteria	Evaluation Scale	Max	Min
<p><b>3.1 - Scientific competence of the Machine-Learning (ML) Subject Matter Expert (SME)</b></p> <p>The bidder should demonstrate the scientific competence of the ML 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 ML 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 ML. 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</p>	<p><b>a) Education of the proposed resource :</b></p> <p>50 pts: Doctorate degree in a field directly related to ML</p> <p>25 pts: Masters degree in a field directly related to ML</p> <p>10 pts: Bachelor degree in a field directly related to ML</p> <p>0 pt: Any other situation.</p> <p><b>b) Professional experience of the proposed resource :</b></p> <p>25 pts: More than 120 months of professional experience directly related to ML</p> <p>20 pts: Between 84 and 120 months of professional experience directly related to ML</p> <p>15 pts: Between 60 and 83 months of professional experience directly related to ML</p> <p>10 pts: Between 24 and 59 months of professional experience directly related to ML</p> <p>5 pts: Between 6 and 23 months of professional experience directly related to the ML</p> <p>0 pt: Any other situation.</p>	100	NA

### Point rated technical criteria

Point rated technical criteria	Evaluation Scale	Max	Min
<p>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>For this criterion, the evaluation team will only consider the proposed ML SME that will work the greatest amount of hours on this project.</p> <p><b>3.2 - Scientific competence of the Case-Based Reasoning (CBR) Subject Matter Expert (SME)</b></p> <p>The bidder should demonstrate the scientific competence of the CBR 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 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. The tasks done in the professional context should be detailed for</p>	<p><b>c) Bonus score :</b></p> <p>For each scientific publication published by the proposed resource in a conference or journal on one ML 5 points will be attributed to the bidder (maximum: 25 bonus points).</p>		
	<p><b>a) Education of the proposed resource:</b></p> <p>50 pts: Doctorate degree in a field directly related to CBR.</p> <p>25 pts: Masters degree in a field directly related to CBR.</p> <p>10 pts: Bachelor degree in a field directly related to CBR.</p> <p>0 pt: Any other situation.</p> <p><b>b) Professional experience of the proposed resource:</b></p> <p>25 pts: More than 120 months of professional experience directly related to CBR.</p> <p>20 pts: Between 84 and 120 months of professional experience directly related to CBR.</p> <p>15 pts: Between 60 and 83 months of professional experience directly related to CBR.</p> <p>10 pts: Between 24 and 59 months of professional experience</p>	100	NA

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### Point rated technical criteria

Point rated technical criteria	Evaluation Scale	Max	Min
<p>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>For this criterion, the evaluation team will only consider the proposed CBR SME that will work the greatest amount of hours on this project.</p>	<p>directly related to CBR.</p> <p>5 pts: Between 6 and 23 months of professional experience directly related to the CBR.</p> <p>0 pt : Any other situation</p> <p><b>c) Bonus score:</b></p> <p>For each scientific publication published by the proposed resource in a conference or journal on one CBR, 5 points will be attributed to the bidder (maximum: 25 bonus points).</p>		
<p><b>3.3- Technical competence of the resources directly involved in the project - GUI Development.</b></p> <p>The bidder should demonstrate the technical competence of the resources 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</p>	<p><b>(a) Professional experience of the proposed resource:</b></p> <p>80 pts: More than 60 months of professional experience directly related to GUI development.</p> <p>60 pts: Between 49 and 60 months of professional experience directly related to GUI development.</p> <p>40 pts: Between 37 and 48 months of professional experience directly related to GUI development.</p> <p>20 pts: Between 25 and 36 months of professional experience directly related to GUI development.</p>	30	NA

### Point rated technical criteria

Point rated technical criteria	Evaluation Scale	Max	Min
<p>knowledge gained.</p> <p>If numerous resources are identified, only the two resources doing the most work in GUI development tasks will be evaluated. The score of the prime resource in GUI development will count for 75% of the overall score, and the score of the second resource will count for 25% of the overall score. The proposal should clearly highlight the total number of hours worked by proposed resources on GUI development. Here, doing the most work means working the greatest amount of hours.</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>The total obtained will be brought back on 30 points.</p> <p>Example of calculation:</p> <p>(a) The prime resource score 80 points /100 points, the second resource score 100 points / 100 points.</p> <p>(b) The score of the prime resource count for 75% of the overall score for this criterion : <math>80 \times 0.75 = 60</math> points</p> <p>(c) the score of the second resource count for 25 % of the overall score for this criterion : <math>100 \times 0.25 = 25</math> points</p> <p>(d) Total score : 85 points / 100 points</p> <p>(e) The total score is brought back on 30 points : <math>(85 / 100) \times 30 = 25.5</math> points / 30 points</p> <p>In the above example of calculation, the bidder would score 25.5 points / 30 points for this criterion.</p>	<p>10 pts: Between 12 and 24 months of professional experience directly related to GUI development.</p> <p>0 pt : Any other situation</p> <p><b>(b) Bonus score:</b></p> <p>Specific training or certification on a Technical aspect directly related to GUI development will also be recognized. Each recognized formation or certification session on a specific topic of interest will yield a 10 pts bonus. (for a maximum of 20)</p>		

### Point rated technical criteria

Point rated technical criteria	Evaluation Scale	Max	Min
<p><b>3.4- Technical competence of the resources directly involved in the project - Software Development.</b></p> <p>The bidder should demonstrate the technical competence of the resources 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 resources are identified, only the two resources doing the most work in software development tasks will be evaluated. The score of the prime resource in software development will count for 75% of the overall score, and the score of the second resource will count for 25% of the overall score. The proposal should clearly highlight the total number of hours worked by proposed resources on software development. Here, doing the most work means working the greatest amount of hours.</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>The total obtained will be brought back on 35 points.</p>	<p><b>(a) Professional experience of the proposed resource:</b></p> <p>80 pts: More than 60 months of professional experience directly related to software development.</p> <p>60 pts: Between 49 and 60 months of professional experience directly related to software development.</p> <p>40 pts: Between 37 and 48 months of professional experience directly related to software development.</p> <p>20 pts: Between 25 and 36 months of professional experience directly related to software development.</p> <p>10 pts: Between 12 and 24 months of professional experience directly related to software development.</p> <p>0 pt : Any other situation</p> <p><b>(b) Bonus score:</b></p> <p>Specific training or certification on a Technical aspect directly related to software development will also be recognized. 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	NA

### Point rated technical criteria

Point rated technical criteria	Evaluation Scale	Max	Min
<p>Example of calculation:</p> <p>(a) The prime resource score 80 points /100 points, the second resource score 100 points / 100 points.</p> <p>(b) The score of the prime resource count for 75% of the overall score for this criterion : <math>80 \times 0.75 = 60</math> points</p> <p>(c) the score of the second resource count for 25 % of the overall score for this criterion : <math>100 \times 0.25 = 25</math> points</p> <p>(d) Total score : 85 points / 100 points</p> <p>(e) The total score is brought back on 35 points : <math>(85 / 100) \times 35 = 29.75</math> points / 35 points</p> <p>In the above example of calculation, the bidder would score 29.75 points / 35 points for this criterion.</p>			
<p><b>3.5- Technical competence of the resources directly involved in the project - Software Integration.</b></p> <p>The bidder should demonstrate the technical competence of the resources 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 resources are identified, only the two resources</p>	<p><b>(a) Professional experience of the proposed resource:</b></p> <p>80 pts: More than 60 months of professional experience directly related to software integration</p> <p>60 pts: Between 49 and 60 months of professional experience directly related to software integration</p> <p>40 pts: Between 37 and 48 months or more of professional experience directly related to software integration</p> <p>20 pts: Between 25 and 36 months of professional experience directly related to software integration</p> <p>10 pts: Between 12 and 24 months of professional experience directly related to software integration</p>	35	NA

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### Point rated technical criteria

Point rated technical criteria	Evaluation Scale	Max	Min
<p>doing the most work in software integration tasks will be evaluated. The score of the prime resource in software integration will count for 75% of the overall score, and the score of the second resource will count for 25% of the overall score. The proposal should clearly highlight the total number of hours worked by proposed resources on software integration. Here, doing the most work means working the greatest amount of hours.</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>The total obtained will be brought back on 35 points.</p> <p>Example of calculation:</p> <p>(a) The prime resource score 80 points /100 points, the second resource score 100 points / 100 points.</p> <p>(b) The score of the prime resource count for 75% of the overall score for this criterion : <math>80 \times 0.75 = 60</math> points</p> <p>(c) the score of the second resource count for 25 % of the overall score for this criterion : <math>100 \times 0.25 = 25</math> points</p> <p>(d) Total score : 85 points / 100 points</p> <p>(e) The total score is brought back on 35 points : <math>(85 / 100) \times 35 = 29.75</math> points / 35 points</p> <p>In the above example of calculation, the bidder would score 29.75 points / 35 points for this criterion.</p>	<p>0 pt : Any other situation</p> <p><b>(b) Bonus score:</b></p> <p>Specific training or certification on a Technical aspect directly related to software integration will also be recognized. Each recognized formation or certification session on a specific topic of interest will yield a 10 pts bonus. (for a maximum of 20)</p>	15	7
<b>4. PROJECT MANAGER</b>		15	7

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### Point rated technical criteria

Point rated technical criteria	Evaluation Scale	Max	Min
<p><b>4.1 - Experience of project manager</b></p> <p>The bidder should demonstrate the experience of its proposed Project Manager in the management of scientific projects involving Software development.</p> <p>The demonstration 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.</p>	<p>10 pts: At least 60 months of experience in this area.</p> <p>8 pts: Between 48 and 59 months of experience in this area.</p> <p>6 pts: Between 36 and 47 months of experience in this area.</p> <p>4 pts: Between 24 and 35 months of experience in this area.</p> <p>2 pts: Between 6 and 23 months of experience in this area.</p> <p>0 pt: Less than 6 months of experience in this area.</p>	10	NA
<p><b>4.2 - Training of project manager</b></p> <p>The training of the PM can be from a university program or from a private program.</p> <p>The bidder should demonstrate the formal training completed by its proposed Project Manager in project management.</p> <p>Academic formation and training detail should include (to a minimum) the name, length, location of the training/formation, the official classification/title obtained (if applicable), and an explanation of specific knowledge gained.</p>	<p>5 pts: More than 300 hours of training completed in this area.</p> <p>3 pts: Between 150 hours and 300 hours of training completed in this area.</p> <p>1 pt: Between 35 hours and 149 hours of training completed in this area.</p> <p>0 pt: Less than 35 hours of training completed in this area.</p>	5	NA
<b>5. MANAGEMENT - TASK/TIME ALLOCATION</b>		40	25

### Point rated technical criteria

Point rated technical criteria	Evaluation Scale	Max	Min
<p><b>5.1 - Task/time allocation</b></p> <p>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 resource. The task/time allocation should be appropriate to meet the objectives of the project.</p>	<p>40 pts: Appropriate number of hours attributed for every task to meet the objectives of the project.</p> <p>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.</p> <p>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.</p>	40	25
<p><b>6. MANAGEMENT - ASSIGNMENT OF RESSOURCES</b></p>			
<p><b>6.1 - Assignment of resource</b></p> <p>The bidder should clearly describe how it intends to assign its resource to the various tasks and the role of each resource with regard to each task. The resource assignments should be realistic, relevant and appropriate to meet the objectives of the project.</p>	<p>50 pts: All resource, 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.</p> <p>40 pts: At least 80% of resource, 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.</p> <p>30 pts: At least 70% of resource, 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.</p> <p>0 pt: less than 70% of resource, 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.</p>	50	30
<p><b>7. CAPABILITIES AND EXPERIENCE OF BIDDER</b></p>			
		10	4

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### Point rated technical criteria

Point rated technical criteria	Evaluation Scale	Max	Min
7.1 - Number of scientific projects involving software development with an annual budget of at least \$100,000.00 completed by the bidder in the last 10 years.	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>TOTAL</b>		<b>460</b>	<b>272</b>

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## **Statement of Work**

### 1. GENERAL

#### **1.1 Title**

Intelligence Virtual Analyst Capability (iVAC) - Framework and Components.

#### **1.2 Objective**

The objectives of the work are:

- The development of a technological framework for the iVAC.
- Develop analysis components to be deployed on the framework.

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

DRDC Valcartier has undertaken a project named Intelligence Virtual Analyst Capability (iVAC). The goal of this project is to investigate the artificial intelligence (AI) technologies behind the ISA concept to generate insights towards the development of an iVAC. A fully functional iVAC system will organize information, learn processes, adapt to changing situations, interactively support the analysts in their tasks in a seamless, intuitive fashion, eventually taking on autonomous tasks in concert with other analysts (virtual or human). At the analysis level, the iVAC will work from formalized representations of domain concepts (ontologies) and identify analysis processes. It will then learn how to adjust them to new, evolving situations, and solve new complex analytical problems. Initially learning from, and working in conjunction with a single intelligence analyst, the iVAC will gradually evolve from individual analysis processes to common analysis processes shared and validated by multiple analysts. If successful, this research will produce a way ahead to provide an iVAC with an appropriate analysis support capability. Such a technological advancement will significantly improve the analysts' ability to cope with the information, cognitive and task overload problems.

##### **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.

## 1.4 Acronyms

ACA	After Contract Award
AR	Automated Reasoning
DRDC	Defence and Research Development Canada
EOI	Element of Interest
FOSS	Free and Open Source Software
GUI	Graphical User Interface
GFE	Government Furnished Equipment
ISTIP	Intelligence Science and Technology Integration Platform
I&I	Intelligence and Information
IP	Intellectual Property
ISA	Intelligent Software Assistant
iVAC	Intelligence Virtual Analyst Capability
NLP	Natural Language Processing
R&D	Research and Development
TA	Technical Authority
SOW	Statement Of Work
URL	Universal Resource Language
VOiLA	Visionary Overarching Interaction Interface Layer for Analysis
WWW	World Wide Web

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## 2. 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 technological framework for the iVAC, as well as to the development of virtual analyst components, to be deployed on this framework.

In order to perform the technological framework development (task 1) and to develop the analysis components (task 2), the contractor must follow the following procedure:

### **Step 1: Investigation**

The contractor is to conduct a survey of available technology and formulate recommendations to the technical authority in the form of a report. Free and Open Source Software (FOSS) must be the primary focus of investigation.

The contractor must focus on the following aspects for each surveyed candidate component:

- (i) investigate its strengths and limitations;
- (ii) investigate its availability, licensing and cost.

Based on the result of the investigation, a solution will be chosen as the candidate component for further development by the technical authority within a week the report's delivery. This selection will form the basis for step 2 and 3.

### **Step 2: Development Planning**

The contractor must develop strategy and approaches to be used for the development of the framework and components. It means that the contractor must:

#### **(a) Framework Development planning (applicable to Task 1)**

- (i) identify, using proper representation, the planned design and architecture of the prototype.
- (ii) include a strategy and architecture to support integration of current and future iVAC components,
- (iii) include a strategy and architecture for the communication and interaction with DRDC's ISTIP and VOiiLA services,
- (iv) include a strategy and architecture to communicate and interact with potential external information sources, software and services.
- (v) include a test plan to validate that the framework meets the requirements.

OR (as applicable)

#### **(b) Analysis component Development Planning (applicable to task 2)**

- (i) identify, using proper representation, the planned design and architecture of the prototype.
- (ii) develop a strategy to support the integration of the component into the iVAC framework.

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- (iii) develop a strategy for the development of assets related to the components (models, data, supporting algorithms).
- (iv) develop a test plan to validate that the analysis components meet the requirements.

The developed strategy and approaches will be validated by the technical authority within a week of the report's delivery. Following this validation, the work for step 3 will begin.

### **Step 3: Development**

The contractor must develop and test the components (identified under step 1) in accordance with the selection and plan produced under steps 2.

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.

#### **TASK 1: Develop the primary iVAC Framework**

The primary iVAC Framework refers to the primary technological components required. Such primary technological components must be integrated and interrelated in such a way that they form a functional entity.

For the purpose of this contract the iVAC framework must contain integrated primary components for the following aspects:

- (a) A Natural Language Processing (NLP) component. This NLP component must be able to:

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- (i) Understand spoken utterances, and convert them into structured input.
- (ii) Formulate spoken utterances based on a structured input.
- (b) An avatar component. This avatar component must be able to support interactions with the user:
  - (i) by mimicking ("saying") the utterances produced by the NLP component.
  - (ii) by producing a certain number of expressions based on different variables. These variables could include, but are not limited to: task being conducted, level of confidence, level of familiarity.
- (c) A fast, flexible, adaptable, scalable architectural backbone to support:
  - (i) the integration of every iVAC component,
  - (ii) the communication and interaction with DRDC's ISTIP and VOiLA services.
  - (iii) the communication and interaction with potential external information sources, software and services.
- (d) A flexible GUI supporting the use and demonstration of every developed analysis component (task 2). The GUI aspects must leverage as much of the VOiLA services as possible.

The technical authority will provide to the contractor a document, containing technological leads (for (a) and (b)) upon the contract award.

#### **TASK 1.1 Primary Component Investigation, framework development planning and development**

The contractor must not develop the required primary components. The contractor must conduct a survey (in accordance with the above procedure – see step 1 to 3) of available technology and formulate recommendations to the technical authority. The selected solution must be integrated into the iVAC Framework by the contractor.

#### **TASK 2: Development of Analysis Components**

In this task we refer to "analysis components" in contrast to with the "primary components" developed in task 1. As stated before, primary components provide the basis for other iVAC components development, deployment, testing, and demonstration, whereas analysis components support or perform actual analysis tasks.

Each developed analysis component must be integrated, and fully functional, within the iVAC framework developed in task 1. Which is to say:

- (a) it must leverage the NLP component for inputs and outputs to the user,
- (b) it must leverage the avatar component to support interaction with the user,
- (c) it must make use of the iVAC Framework architecture in order to interact with: other iVAC components; ISTIP services and VOiiLA widgets; external information sources, software and services.

Each component developed in this task must be developed following the procedure described above (see step 1 to 3). The components to be developed are described at section 2.1 of this annex.

The contractor must note that the development of analysis component is likely to entail development. It may imply the composition of various scientific and technological aspects.

### **TASK 3: Demonstration**

The contractor must prepare a complete demonstration of the final version of the system 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 system'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:

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

## **2.1 Description of the Components to be developed under task 2**

### **(a) Context Specification Component**

Based on the input from the current user, this analysis component must acquire information about the user context.

The system must be aware of the user's context. Generally, the context refers to the interrelated conditions in which something exists or occurs. Within the iVAC, the context refers to any information that can be used to characterize the situation of the user. The notion of context applies both to the user itself, and to analysis being performed. This is to say that a user can be performing an analysis task from his office in Ottawa (user context) and that this particular task may be focusing on retrieving document about crop farmers in Afghanistan (analysis context).

The contractor must develop a context model that represents both the user and analysis contexts. This model must reflect elements such as: Mission Objective, User Role, Task, Location (where?), Identity (who?), Time (when?), Activity (what?), Geopolitical/Cultural/Social/Economical...

The component (through a combination of NLP and GUI) must allow the user to specify and validate the current user and analysis contexts.

### **(b) Document Retrieval Component**

Based on a request (topic or keywords) from the user, and on the specifics of the context, this analysis component must retrieve relevant documents from a given document collection.

This component must leverage as much as possible the available DRDC Valcartier software components and services which specialize in text annotation and retrieval based on specific topics. These DRDC software components and services will be provided to the contractor upon contract award along with documentation.

The component (through a combination of NLP and GUI) must allow the user to visualize and provide feedback (validation and ranking) on the retrieved documents.

### **(c) Element of Interest Identification Component**

The contractor must develop a EOI model.

The term "element of interest" (EOI) is coined from the pre-existing "person of interest" (POI), "compound of interest" (COI) and "vehicle (or vessel) of interest" (VOI), which are recurring concepts in the Intelligence community. In a general sense an "element of interest" can be any element from a situation (person, vehicle, vessel, building...) that is deemed interesting based on a set of criteria.

The EOI component must identify elements from a specified data source based on a set of criteria. For the current work effort, this component should leverage the legacy DRDC Valcartier software components and services which specialize in situation description. These DRDC software components and services will be provided to the contractor upon contract award along with documentation.

The component (through a combination of NLP and GUI) must allow the user to identify the type of element which is of interest (as well as its location/source). It should also allow the user to identify and specify the criteria which are to be used to measure "interest". It should allow the user to visualize and provide feedback (validation and ranking) on the retrieved elements.

#### **(d) Solution Feedback Component**

For any given specific analysis task performed by the system, the user must be able to provide feedback to allow the analysis process to be validated and tuned. This feedback process will vary based on the analysis task performed. The validation may take different forms, for instance a ranking of results, or a selection of set of relevant results.

For the purpose of this contract the Solution Feedback Component must support the following analysis components: the document retrieval component and the element of Interest Identification Component.

The component (through a combination of NLP and GUI) must allow the user to provide feedback. Based on the feedback it must adjust its analysis process (algorithm) and provide new results. The system must validate the "updated" analysis parameters with the user (e.g.: "*Now looking for individuals with weapon training **AND a criminal record***".) Based on this process, the system must gain a better understanding of how to perform a specific analysis task, and re-apply it in the future.

This component must leverage the work done by DRDC Valcartier on self-improving inference systems. DRDC software components, services, and relevant information will be provided to the contractor upon contract award along with documentation.

This component must be supported by an appropriate combination of NLP and GUI.

#### **(e) Context Feedback Component**

Context specification is addressed in section 2.1a). The nature of the context feedback component is akin to the solution feedback component's. Indeed, the solution feedback component aims at improving and refining a solution to an analysis problem based on user feedback. The Context Feedback Component aims at refining the context based on the particular process that was applied to solving an analysis problem. Here, context refers specifically to the user and analysis context, with a strong emphasis on the role, goal and task taken on by the user.

The objective is to compare the process being applied to a given analysis problem in a specific context, and evaluate its similarity to other, possibly similar problems in similar contexts.

**Example:** *An intelligence analyst has a goal of identifying drug smugglers. The analyst asks for a list of all individuals with criminal records. In the past, a very similar analyst was working on a very similar goal. He had used a list of individuals with drug-related convictions to reach a solution. Based on this similarity, the system suggests also suggests a list of individuals with drug-related convictions to the analyst.*

This process entails the modelling of goals and tasks. It also involves the capability of measuring the similarity between these models.

This component must leverage the work done by DRDC Valcartier on self-improving inference systems. DRDC software components, services, and relevant information will be provided to the contractor upon contract award along with documentation.

This component must be supported by a combination of NLP and GUI.

### 3. MEETINGS

#### **3.1 General information**

##### 3.1.1 Agenda and minutes:

For each meeting, the Contractor must prepare the agenda at least 24 hours before the date of the meeting. The contractor is also responsible for the preparation of the minutes. The contractor must provide the minutes to the technical authority no later than five working days after the date of the meeting for approval.

##### 3.1.2 Languages:

The meetings must be held in French or English (as selected by the contractor).

#### **3.2 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. For this meeting the agenda must include at a minimum, the following items:

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

### **3.3 Progress Review Meetings**

A progress review meeting will be held every month throughout the contract with the Technical Authority. Each progress review meeting must cover at least the following items:

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

#### **3.1.1 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. Informal meetings and communications are encouraged and may be held at any time to discuss and resolve specific issues.

#### **3.1.2 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.

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

The Contractor is responsible for the following deliverables:

<b>Tasks</b>	<b>Description</b>	<b>Deliverables</b>	<b>Deadlines</b>
1. and 1.1	Primary Component Investigation (step 1)	1.1 Primary Components Investigation Report. It must include at least the following information : (i) a short summary of every surveyed candidate component, (ii) the strengths and limitations of every surveyed candidate component, (iii) the information on the availability, licensing and cost of the candidate component, (iv) a recommendation for the top two components, along with an appropriate justification for every of the primary component aspect described under task 1 paragraphs (a), (b), (c) and (d).	2 months after contract award.
1. and 1.1	Framework Development Planning (step	1.2 Framework Development Plan. The document must include at least the following information: (i) the identification, using proper representation,	3 months after contract award

Tasks	Description	Deliverables	Deadlines
	2)	of the planned design and architecture of the prototype. (ii) a strategy and architecture to support integration of current and future iVAC components, (iii) a strategy and architecture for the communication and interaction with DRDC's ISTIP and VOiLA services, (iv) a strategy and architecture to communicate and interact with potential external information sources, software and services. (v) a test plan to validate that the framework meets the requirements.	
1. and 1.1	Framework Development (step 3)	1.3 iVAC Framework 1.4 Source Code 1.5 User Guide 1.6 Installation Guide 1.7 Test procedures, datasets and results The installation guide and user guide must be produced for the Framework and each component developed. These documents must allow the DRDC Valcartier to install and use the component without additional support from the contractor.	6 months after contract award.
2.	Analysis Components Investigation (step 1)	2.1 Analysis Components Investigation Report. For each components investigation the contractor must produce a report that contain at least the following information: (i) a short summary of every surveyed candidate component, (ii) strengths and limitations of every surveyed candidate component, (iii) information on the availability, licensing and cost of the candidate component, (iv) a recommendation for the top two components, along with an appropriate justification for every of the analysis component aspect.	8 months after contract award.
2	Analysis Components Development Planning (step 2)	2.2 Analysis Components Development Plan. For each candidate selected for the analysis component implementation, the contractor must produce a document that contain at least the following information: (i) the identification, using proper representation, the planned design and architecture of the prototype. (ii) a strategy architecture for the integration of the component into the iVAC framework. (iii) a description and strategy for the development of assets related to the components	9 months after contract award.

Tasks	Description	Deliverables	Deadlines
		(models, data, supporting algorithms). (iv) a test plan to validate that the analysis components meet the requirements	
2	Analysis Component Development (step 3)	2.3 Deployed Analysis Components 2.4 Source Code 2.5 User Guide 2.6 Installation Guide 2.7 Test procedures, datasets and results The installation guide and user guide must be produced for each component developed. These documents must allow the DRDC Valcartier to install and use the component without additional support from the contractor.	2 months before the end of the contract period.
3	Demonstration	3.1 The details of the scenario and the datasets (to support the demonstration of the developed components described under task 3)	1 month before the end of the contract period.
3	Demonstration	3.2 Final version of the Software and source code	1 month before the end of the contract award.
See section 3.1.3	Contract conclusion meeting	4.1 The final version of the Contractor's presentation in electronic format (Microsoft PowerPoint Slides). The document must present the outcome and findings of the contract. The presentation must include a summary of the work that was conducted, along with the findings that occurred. It must also contain the Technical Authority and the stakeholder feedback given during the presentation.	1 week before the end of the contract period.

#### 4.1 General information:

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 10 working days before the deadline. The final 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.

Solicitation No. - N° de l'invitation  
W7701-135551/A

Amd. No. - N° de la modif.

Buyer ID - Id de l'acheteur  
qc1032

Client Ref. No. - N° de réf. du client  
W7701-13-5551

File No. - N° du dossier  
QCL-2-35475

CCC No./N° CCC - FMS No./N° VME

#### 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.

#### 4.3 Foreground Information

In addition to the disclosure obligation under Section 28 of the general conditions 2040, any Foreground Information must be fully disclosed and documented by the Contractor in the technical reports delivered by the Contractor to the Technical Authority under this Contract.

### 5. GOVERNMENT SUPPLIED MATERIAL (GSM)

The Technical Authority will provide background information on the IPB/IPOE process, on the ISTIP, VOiilA upon contract award. All the available ISTIP documentation will be provided. A document, containing technological leads for certain components will be provided to the contractor after the contract award. 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)

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 at DRDC Valcartier (2459 Pie-XI Blvd North Quebec city, Quebec, 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 demonstration are to be held at DRDC Valcartier.