

**RETURN BIDS TO:
RETOURNER LES SOUMISSIONS À:**

**Bid Receiving
PWGSC
33 City Centre Drive
Suite 480
Mississauga
Ontario
L5B 2N5
Bid Fax: (905) 615-2095**

**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

Title - Sujet Support Research Activities	
Solicitation No. - N° de l'invitation W7719-145238/A	Date 2013-06-13
Client Reference No. - N° de référence du client W7719-145238	
GETS Reference No. - N° de référence de SEAG PW-\$TOR-002-6293	
File No. - N° de dossier TOR-3-36024 (002)	CCC No./N° CCC - FMS No./N° VME
Solicitation Closes - L'invitation prend fin at - à 02:00 PM on - le 2013-07-04	
Time Zone Fuseau horaire Eastern Daylight Saving Time EDT	
F.O.B. - F.A.B. Plant-Usine: <input type="checkbox"/> Destination: <input checked="" type="checkbox"/> Other-Autre: <input type="checkbox"/>	
Address Enquiries to: - Adresser toutes questions à: Callahan, Kaye	Buyer Id - Id de l'acheteur tor002
Telephone No. - N° de téléphone (905) 615-2071 ()	FAX No. - N° de FAX (905) 615-2060
Destination - of Goods, Services, and Construction: Destination - des biens, services et construction: DEPARTMENT OF NATIONAL DEFENCE 1133 SHEPPARD AVE W. TORONTO Ontario M3K2C9 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

Public Works and Government Services Canada
Ontario Region
33 City Centre Drive
Suite 480
Mississauga
Ontario
L5B 2N5

Delivery Required - Livraison exigée 2013-08-01	Delivery Offered - Livraison proposée
Vendor/Firm Name and Address Raison sociale et adresse du fournisseur/de l'entrepreneur	
Telephone No. - N° de téléphone Facsimile No. - N° de télécopieur	
Name and title of person authorized to sign on behalf of Vendor/Firm (type or print) Nom et titre de la personne autorisée à signer au nom du fournisseur/ de l'entrepreneur (taper ou écrire en caractères d'imprimerie)	
Signature	Date

TABLE OF CONTENTS

PART 1 - GENERAL INFORMATION

1. Introduction
2. Summary
3. Debriefings

PART 2 - BIDDER INSTRUCTIONS

1. Standard Instructions, Clauses and Conditions
2. Submission of Bids
3. Former Public Servant
4. Enquiries - Bid Solicitation
5. Applicable Laws
6. Basis for Canada's Ownership of Intellectual Property

PART 3 - BID PREPARATION INSTRUCTIONS

1. Bid Preparation Instructions

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

1. Evaluation Procedures
2. Basis of Selection

PART 5 - CERTIFICATIONS

1. Mandatory Certifications Required Precedent to Contract Award
2. Additional Certifications Precedent to Contract Award and Certifications Required with the Bid

PART 6 - RESULTING CONTRACT CLAUSES

1. Statement of Work
2. Standard Clauses and Conditions
3. Security Requirement
4. Term of Contract
5. Authorities
6. Proactive Disclosure of Contracts with Former Public Servants
7. Payment
8. Invoicing Instructions
9. Certifications
10. Applicable Laws
11. Priority of Documents
12. Foreign Nationals (Canadian Contractor)
13. Insurance Requirements

Solicitation No. - N° de l'invitation

W7719-145238/A

Amd. No. - N° de la modif.

File No. - N° du dossier

TOR-3-36024

Buyer ID - Id de l'acheteur

tor002

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

W7719-145238

CCC No./N° CCC - FMS No/ N° VME

List of Annexes:

Annex "A"	Statement of Work
Annex "B"	Basis of Payment
Annex "C"	Insurance Requirements
Annex "D"	DND 626, Task Authorization Form
Annex "E"	Evaluation Criteria and Basis of Selection

PART 1 - GENERAL INFORMATION

1. Introduction

The bid solicitation is divided into six 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 Resulting Contract Clauses: includes the clauses and conditions that will apply to any resulting contract.

The Annexes include the Statement of Work the Basis of Payment, the Insurance Requirements, DND 626 Task Authorization Form and Evaluation Criteria and Basis of Selection.

2. Summary

Defence Research and Development Canada, Toronto, Ontario has a requirement for the provision of Human Technology Interaction Research support services. The objective of the work includes the design, development and evaluation of human technology interaction (HTI) concepts, and methodologies to improve overall Human-Machine System (HMS) performance for the Canadian Forces.

Work will be performed on an as and when requested basis during a three year period from date of award.

Bidders must provide a list of names, or other related information as needed, pursuant to section 01 of Standard Instructions 2003.

Bidders in receipt of a pension or a lump sum payment must provide the required information as detailed in article 3 of Part 2 of the bid solicitation.

The requirement is subject to a preference for Canadian goods and/or services.

3. Debriefings

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

PART 2 - BIDDER INSTRUCTIONS

1. Standard Instructions, Clauses and Conditions

All instructions, clauses and conditions identified in the bid solicitation by number, date and title are set out in the *Standard Acquisition Clauses and Conditions 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.

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

Delete: sixty (60) days
Insert: ninety (90) days

2. Submission of Bids

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

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

3. Former Public Servants

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.

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.

4. Enquiries - Bid Solicitation

All enquiries must be submitted in writing to the Contracting Authority no later than seven (7) calendar days before the bid closing date. Enquiries received after that time may not be answered.

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

5. Applicable Laws

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

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.

9. Basis for Canada's Ownership of Intellectual Property

Defence Research and Development Canada (DRDC) 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 main purpose of the contract, or of the deliverables contracted for, is to generate knowledge and information for public dissemination

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 (3 hard copies)

Section II: Financial Bid (1 hard copy)

Section III: Certifications (1 hard copies)

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

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

- (a) use 8.5 x 11 inch (216 mm x 279 mm) paper;
- (b) use 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>). To assist Canada in reaching its objectives, bidders should:

- 1) use 8.5 x 11 inch (216 mm x 279 mm) 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, printing 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 address clearly and in sufficient depth the points that are subject to the evaluation criteria against which the bid will be evaluated. Simply repeating the statement contained in the bid solicitation is not sufficient. In order to facilitate the evaluation of the bid, Canada requests that bidders address and present topics in the order of the evaluation criteria under the same headings. To avoid duplication, bidders may refer to different sections of their bids by identifying the specific paragraph and page number where the subject topic has already been addressed.

Section II: Financial Bid

- 1.1 Bidders must submit their financial bid in accordance with the Basis of Payment in Annex "B"). The total amount of Applicable Taxes must be shown separately.

- 1.2 **Exchange Rate Fluctuation**

C3011T (2010-01-11), Exchange Rate Fluctuation

Section III: Certifications

Bidders must submit the certifications required under Part 5.

PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

1. Evaluation Procedures

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

1.1 Technical Evaluation

1.1.1 Mandatory Technical Criteria

See Annex E, Evaluation Criteria and Basis of Selection.

1.1.2 Point Rated Technical Criteria

See Annex E, Evaluation Criteria and Basis of Selection.

1.2 Financial Evaluation

See Annex E, Evaluation Criteria and Basis of Selection.

2. Basis of Selection

See Annex E, Evaluation Criteria and Basis of Selection

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 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

1. Mandatory Certifications Required Precedent to Contract Award

1.1 Code of Conduct and Certifications - Related documentation

By submitting a bid, the Bidder certifies that the Bidder and its affiliates are in compliance with the provisions as stated in Section 01 Code of Conduct and Certifications - Bid of Standard Instructions 2003. The related documentation therein required will assist Canada in confirming that the certifications are true.

2. Additional Certifications Precedent to Contract Award and Certifications Required with the Bid

Bidders must submit the certifications as provided below:

2.1 Additional Certifications Precedent to Contract Award

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

2.1.1 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.

2.1.2 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.

2.1.3 Education and Experience

SACC Manual clause A3010T (2010-08-16) Education and Experience

2.2 Additional Certifications Required with the Bid

Bidders must submit the following duly completed certifications with their bid.

2.2.1 Canadian Content

This procurement is conditionally limited to Canadian services.

Subject to the evaluation procedures contained in the bid solicitation, bidders acknowledge that only bids with a certification that the service offered is a Canadian service, as defined in clause A3050T, may be considered.

Failure to provide this certification completed with the bid will result in the service offered being treated as a non-Canadian service.

The Bidder certifies that:

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

2.2.1.1 SACC Manual clause A3050T (2010-01-11) Canadian Content Definition

PART 6 - 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 _____.

1.2 Task Authorization

The Work or a portion of the Work to be performed under the Contract will be on an "as and when requested basis" using a Task Authorization (TA). The Work described in the TA must be in accordance with the scope of the Contract.

1.2.1 Task Authorization Process:

1. The Technical Authority will provide the Contractor with a description of the task using the "Task Authorization" form specified in Annex D.
2. The Task Authorization (TA) will contain the details of the activities to be performed, a description of the deliverables, and a schedule indicating completion dates for the major activities or submission dates for the deliverables. The TA will also include the applicable basis(bases) and methods of payment as specified in the Contract.
3. The Contractor must provide the Technical Authority, within 10 calendar days of its receipt, the proposed total estimated cost for performing the task and a breakdown of that cost, established in accordance with the Basis of Payment specified in the Contract.
4. The Contractor must not commence work until a TA authorized by the Technical Authority) has been received by the Contractor. The Contractor acknowledges that any work performed before a TA has been received will be done at the Contractor's own risk.

1.2.2 Task Authorization Limit

The Technical Authority may authorize individual task authorizations up to a limit of \$200,000.00, Goods and Services Tax or Harmonized Sales Tax included, inclusive of any revisions.

Any task authorization to be issued in excess of that limit must be authorized by the Contracting Authority before issuance.

1.2.3 Minimum Work Guarantee - All the Work - Task Authorizations

1. In this clause,

"Maximum Contract Value" means the amount specified in the "Limitation of Expenditure" clause set out in the Contract; and

"Minimum Contract Value" means \$50,000.00 HST extra.

2. Canada's obligation under the Contract is to request Work in the amount of the Minimum Contract Value or, at Canada's option, to pay the Contractor at the end of the Contract in accordance with paragraph 3. In consideration of such obligation, the Contractor agrees to stand in readiness throughout the Contract period to perform the Work described in the Contract. Canada's maximum liability for work performed under the Contract must not exceed the Maximum Contract Value, unless an increase is authorized in writing by the Contracting Authority.

3. In the event that Canada does not request work in the amount of the Minimum Contract Value during the period of the Contract, Canada must pay the Contractor the difference between the Minimum Contract Value and the total cost of the Work requested.

4. Canada will have no obligation to the Contractor under this clause if Canada terminates the Contract in whole or in part for default.

1.2.4 Task Authorization - Department of National Defence

The administration of the Task Authorization process will be carried out by the DRDC Toronto Procurement Authority. This process includes monitoring, controlling and reporting

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 (2013-04-25), General Conditions - Research & Development, apply to and form part of the Contract.

2.2 Canada to Own Intellectual Property Rights in Foreground Information

SACC Manual Clause K3410C (2008-12-12) Canada to Own Intellectual Property Rights in Foreground Information

3. Security Requirement

There is no security requirement applicable to this Contract.

4. Term of Contract

4.1 Period of the Contract

The period of the Contract will be for three years from date of Contract award. (Dates will be inserted upon award.)

5. Authorities

5.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: Kaye Callahan
Title: Supply Team Leader
Public Works and Government Services Canada
Acquisitions Branch
Directorate: Ontario
Address: 33 City Centre Dr., Ste. 480C
Mississauga, Ontario
L5B 2N1

Telephone: 905-615-2071
Facsimile: 905-615-2060
E-mail address: kaye.callahan@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.

5.2 Project Authority

The Project Authority for the Contract is:

Name: _____
Title: _____
Organization: _____
Address: _____

Telephone: ____-____-_____
Facsimile: ____-____-_____
E-mail address: _____

The Project 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 Project Authority; however, the Project 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.

5.3 Contractor's Representative

Name: _____
Title: _____
Organization: _____
Address: _____

Telephone: ____-____-_____
Facsimile: ____-____-_____
E-mail address: _____

E-mail address: _____

6. Proactive Disclosure of Contracts with Former Public Servants (when applicable)

By providing information on its status, with respect to being a former public servant in receipt of a Public Service Superannuation Act (PSSA) pension, the Contractor has agreed that this information will be reported on departmental websites as part of the published proactive disclosure reports, in accordance with Contracting Policy Notice: 2012-2 of the Treasury Board Secretariat of Canada.

7. Payment

7.1 Basis of Payment - Limitation of Expenditure - Task Authorizations

The Contractor will be reimbursed for the costs reasonably and properly incurred in the performance of the Work specified in the authorized Task Authorization (TA), as determined in accordance with the Basis of Payment in Annex B, to the limitation of expenditure specified in the authorized TA.

Canada's liability to the Contractor under the authorized TA must not exceed the limitation of expenditure specified in the authorized TA. Customs duties are included and Applicable Taxes are extra.

No increase in the liability of Canada or in the price of the Work specified in the authorized TA 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 authorized, in writing, by the Contracting Authority before their incorporation into the Work.

7.2 Limitation of Expenditure - Cumulative Total of all Task Authorizations

1. Canada's total liability to the Contractor under the Contract for all authorized Task Authorizations (TAs), inclusive of any revisions, must not exceed the sum of \$ 884,000.00. Customs duties are included and the Goods and Services Tax or Harmonized Sales Tax is extra, if applicable.

2. No increase in the total liability of Canada will be authorized or paid to the Contractor unless an increase has been approved, in writing, by the Contracting Authority.

3. 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 sum is inadequate for the completion of the Work required in all authorized TAs, inclusive of any revisions, whichever comes first.

4. 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.

7.3 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, Claim for Progress Payment, 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 rights 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.

7.4 Milestone Payments

1. Canada will make milestone payments in accordance with the Schedule of Milestones detailed in the Contract and the payment provisions of the Contract, 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, Claim for Progress Payment, and any other document required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;

b. the total amount for all milestone payments paid by Canada does not exceed 90 percent of the total amount to be paid under the Contract;

c. all the certificates appearing on form PWGSC-TPSGC 1111 have been signed by the respective authorized representatives;

d. all work associated with the milestone and as applicable any deliverable required have been completed and accepted by Canada.

2. The balance of the amount payable will be paid in accordance with the payment provisions of the Contract upon completion and delivery of the item if the Work has been accepted by Canada and a final claim for the payment is submitted.

7.5 SACC Manual Clauses

SACC Manual Clause A9117C (2007-11-30) T1204 - Direct Request by Customer Department

7.6 Time Verification

SACC Manual Clause C0711C (2008-05-12) Time Verification

8. Invoicing Instructions- Progress Payment Claim

1. The Contractor must submit a claim for payment using form PWGSC-TPSGC 1111, Claim for Progress Payment.

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. 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, travel and living expenses;
- c. a copy of the monthly progress report.

2. The Goods and Services Tax or Harmonized Sales Tax (GST/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 Technical Authority identified under the section entitled "Authorities" of the Contract for appropriate certification after inspection and acceptance of the Work takes place.

The Technical Authority will then forward the original and two (2) copies of the claim to the Contracting 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.

9. Certifications

9.1 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 term of the Contract. 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.

9.2 SACC Manual Clauses

SACC Manual Clause A3060C (2008-05-12) Canadian Content Certification

10. Applicable Laws

The Contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in _____.

11. 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 general conditions 2040 ((2013-04-25) General Conditions - Research and Development;
- (c) Annex A, Statement of Work;
- (d) Annex B, Basis of Payment;
- (e) Annex C, Insurance Requirements
- (f) the signed Task Authorizations (including all of its annexes, if any);
- (g) the Contractor's bid dated _____.

12. Foreign Nationals (Canadian Contractor)

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

13. Insurance Requirements

The Contractor must comply with the insurance requirements specified in Annex C. The Contractor must maintain the required insurance coverage for the duration of the Contract. Compliance with the insurance requirements does not release the Contractor from or reduce its liability under the Contract.

The Contractor is responsible for deciding if additional insurance coverage is necessary to fulfill its obligation under the Contract and to ensure compliance with any applicable law. Any additional insurance coverage is at the Contractor's expense, and for its own benefit and protection.

The Contractor must forward to the Contracting Authority within ten (10) days after the date of award of the Contract, a Certificate of Insurance evidencing the insurance coverage and confirming that the insurance policy complying with the requirements is in force. Coverage must be placed with an Insurer licensed to carry out business in Canada. The Contractor must, if requested by the Contracting Authority, forward to Canada a certified true copy of all applicable insurance policies.

Solicitation No. - N° de l'invitation

W7719-145238/A

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

W7719-145238

Amd. No. - N° de la modif.

File No. - N° du dossier

TOR-3-36024

Buyer ID - Id de l'acheteur

tor002

CCC No./N° CCC - FMS No/ N° VME

ANNEX A

STATEMENT OF WORK

This document is attached separately.

ANNEX B**BASIS OF PAYMENT****A. LABOUR: At firm hourly rates including overhead and profit**

Category/Personnel	Year 1	Year 2	Year 3
1. Senior Researcher			
Name _____	\$ _____	\$ _____	\$ _____
2. Specialist Researcher			
Name _____	\$ _____	\$ _____	\$ _____
3. Technical Support Researchers			
Name _____	\$ _____	\$ _____	\$ _____
Name _____	\$ _____	\$ _____	\$ _____

B. DIRECT CHARGES

1. The equipment and costs will be identified in the Task Authorization and claims for payment. At the completion of each Task Authorization, DRDC will receive any equipment, hardware, software or software licenses purchased as part of the deliverables.

2. Materials and Supplies: at actual cost

3. Equipment: at actual cost

4. Travel and Living: in accordance with Contractor's current travel policy but not to exceed Treasury Board Guidelines on travel and living in effect at time travel occurs.

[Http://www.tbs-sct.gc.ca/pubs_pol/hrpubs/tbm_113/menu-travel-voyage-eng.asp](http://www.tbs-sct.gc.ca/pubs_pol/hrpubs/tbm_113/menu-travel-voyage-eng.asp)

TOTAL ESTIMATED COST AND LIMITATION OF EXPENDITURE \$884,000.00
GST/HST EXTRA

ANNEX C

INSURANCE REQUIREMENTS

1. Commercial General Liability Insurance

1.1 The Contractor must obtain Commercial General Liability Insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature, but for not less than \$2,000,000 per accident or occurrence and in the annual aggregate.

2.1 The Commercial General Liability policy must include the following:

(a) Additional Insured: Canada is added as an additional insured, but only with respect to liability arising out of the Contractor's performance of the Contract. The interest of Canada should read as follows: Canada, as represented by Public Works and Government Services Canada.

(b) Bodily Injury and Property Damage to third parties arising out of the operations of the Contractor.

(c) Products and Completed Operations: Coverage for bodily injury or property damage arising out of goods or products manufactured, sold, handled, or distributed by the Contractor and/or arising out of operations that have been completed by the Contractor.

(d) Personal Injury: While not limited to, the coverage must include Violation of Privacy, Libel and Slander, False Arrest, Detention or Imprisonment and Defamation of Character.

(e) Cross Liability/Separation of Insureds: Without increasing the limit of liability, the policy must protect all insured parties to the full extent of coverage provided. Further, the policy must apply to each Insured in the same manner and to the same extent as if a separate policy had been issued to each.

(f) Blanket Contractual Liability: The policy must, on a blanket basis or by specific reference to the Contract, extend to assumed liabilities with respect to contractual provisions.

(g) Employees and, if applicable, Volunteers must be included as Additional Insured.

(h) Employers' Liability (or confirmation that all employees are covered by Worker's compensation (WSIB) or similar program)

(i) Broad Form Property Damage including Completed Operations: Expands the Property Damage coverage to include certain losses that would otherwise be excluded by the standard care, custody or control exclusion found in a standard policy.

(j) Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of policy cancellation.

(k) If the policy is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.

(l) Owners' or Contractors' Protective Liability: Covers the damages that the Contractor becomes legally obligated to pay arising out of the operations of a subcontractor.

(m) Non-Owned Automobile Liability - Coverage for suits against the Contractor resulting from the use of hired or non-owned vehicles.

(n) Sudden and Accidental Pollution Liability (minimum 120 hours): To protect the Contractor for liabilities arising from damages caused by accidental pollution incidents.

(o) Litigation Rights: Pursuant to subsection 5(d) of the Department of Justice Act, S.C. 1993, c. J-2, s.1, if a suit is instituted for or against Canada which the Insurer would, but for this clause, have the right to pursue or defend on behalf of Canada as an Additional Named Insured under the insurance policy, the Insurer must promptly contact the Attorney General of Canada to agree on the legal strategies by sending a letter, by registered mail or by courier, with an acknowledgement of receipt.

For the province of Quebec, send to:

Director Business Law Directorate,
Quebec Regional Office (Ottawa),
Department of Justice,
284 Wellington Street, Room SAT-6042,
Ottawa, Ontario, K1A 0H8

For other provinces and territories, send to:

Senior General Counsel,
Civil Litigation Section,
Department of Justice
234 Wellington Street, East Tower
Ottawa, Ontario K1A 0H8

A copy of the letter must be sent to the Contracting Authority. Canada reserves the right to co-defend any action brought against Canada. All expenses incurred by Canada to co-defend such actions will be at Canada's expense. If Canada decides to co-defend any action brought against it, and Canada does not agree to a proposed settlement agreed to by the Contractor's insurer and the plaintiff(s) that would result in the settlement or dismissal of the action against Canada, then Canada will be responsible to the Contractor's insurer for any difference between the proposed settlement amount and the amount finally awarded or paid to the plaintiffs (inclusive of costs and interest) on behalf of Canada.

1. Errors and Omissions Liability Insurance

1. The Contractor must obtain Errors and Omissions Liability (a.k.a. Professional Liability) insurance, and maintain it in force throughout the duration of the Contract, in an amount usual for a contract of this nature but for not less than \$1,000,000 per loss and in the annual aggregate, inclusive of defence costs.

2. If the policy is written on a claims-made basis, coverage must be in place for a period of at least 12 months after the completion or termination of the Contract.

3. The following endorsement must be included:

Notice of Cancellation: The Insurer will endeavour to provide the Contracting Authority thirty (30) days written notice of cancellation.

Solicitation No. - N° de l'invitation

W7719-145238/A

Amd. No. - N° de la modif.

File No. - N° du dossier

TOR-3-36024

Buyer ID - Id de l'acheteur

tor002

CCC No./N° CCC - FMS No/ N° VME

W7719-145238

ANNEX "D"
DND 626 TASK AUTHORIZATION FORM

This document is attached separately.

Solicitation No. - N° de l'invitation

W7719-145238/A

Amd. No. - N° de la modif.

File No. - N° du dossier

TOR-3-36024

Buyer ID - Id de l'acheteur

tor002

CCC No./N° CCC - FMS No/ N° VME

W7719-145238

ANNEX "E"

EVALUATION CRITERIA AND BASIS OF SELECTION

This document is attached separately.

PROPOSED TASK AUTHORIZATION CONTRACT

“SUPPORT HUMAN-TECHNOLOGY INTERACTION RESEARCH”

STATEMENT OF WORK

LIST OF ACRONYMS

CF:	Canadian Forces
DND:	Department of National Defence
DRDC:	Defence Research and Development Canada
HTI:	Human-Technology Interaction
HMS:	Human-Machine System
SA:	Scientific Authority
SME:	Subject Matter Expert
SOW:	Statement of Work
TAC:	Task Authorization Contract

1. Short Title

HTI Support

2. Objective

To design, develop, and evaluate human-technology interaction (HTI) concepts and methodologies to improve overall Human-Machine System (HMS) performance for the Canadian Forces (CF).

3. Background

3.1 Technologies have become integral parts of a human-machine system (HMS). There are capabilities of many military systems in which operators need to optimize the interaction with them and accomplish mission tasks effectively. To enhance CF decision aid and operational effectiveness, the Human-Technology Interaction (HTI) group at Defence Research and Development Canada – Toronto (DRDC Toronto) has the mandate to build up research capabilities, conduct and guide research and development, and provide human factors advice on optimal HTIs. One of the greatest challenges for improving HTIs from the level of the individual to teams and organisations is to understand the strengths and limitations of both human and technologies, maintain knowledge of state-of-the-art technologies, and design effective HMSs to maximize system performance. To conduct HTI research and provide advice to the CF on the design, implementation, and operation of technology-based military systems such as robotics systems, this Task Authorization Contract (TAC) will conduct research in existing design concepts, approaches and best practices in HTI and support the development and evaluation of new HTI concepts and HTI design guidance for CF robotics systems

- 3.2 The aim of this work is to investigate, develop, demonstrate, evaluate, and prioritize enabling concepts and technologies that can be applied to optimal HTIs to improve overall system performance. These emerging concepts include multimodal displays, attention-aware displays (sustained attention), clutter and situation awareness, salience mapping of auditory warnings, trust in automation, human-automation interaction, human-systems integration of unmanned systems, intelligent adaptive interfaces, augmented cognition, intelligent tutoring, etc.
- 3.3 In order to manage this work efficiently, a TAC is required for a three year period. This statement of work (SOW) is intended to form the basis for this TAC arrangement that will allow DRDC Toronto to task services (described below) from the Contractor on an “as-required” basis.

4. Scope

- 4.1 The Contractor must provide human factors services in support of DRDC’s HTI research program on technologies. Work will normally occur at the Contractor’s site and involve carrying out some development and experimentation tasks at DRDC Toronto and other possible locations.
- 4.2 Actual work items will be negotiated between DRDC Toronto and the Contractor as required. Examples of typical tasks are listed below:
- 4.2.1 Perform literature reviews on topics including: human-automation interaction, intelligent adaptive systems, intelligent tutoring, multimodal displays, and sustained attention. Provide conclusions and recommendations where applicable.
 - 4.2.2 Compile bibliographies on topics (e.g., HTI design framework and verification, trust in automation, operator-agent interaction, system-based measures, operator-based measures, decision-making quality, etc.) determined by the SA.
 - 4.2.3 Design, develop, implement, and evaluate HTI concepts, methodologies, and technology prototypes of human-machine interfaces and/or control stations for robotics systems. This will include (but not be limited to) software integration and programming tasks using various programming and scripting languages such as C, C++, C#, Python, MATLAB/SIMULINK, JAVA, etc.; using various software architectures such as JAUS (Joint Architecture for Unmanned Systems) and ROS (Robot Operating System); as well as distributed simulation architectures such as HLA (high-level architecture) and DIS (distributed interactive simulation). This type of task may also entail modifications and setting up of hardware platforms.
 - 4.2.4 Design, develop, and administer questionnaires that solicit the efficacy of the HTI methodologies and technologies.

- 4.2.5 Prepare, in collaboration with the SA, experimental protocols and submit the protocols to the DRDC Human Research Ethics Committee through the SA for review and acceptance prior to commencing subject testing.
- 4.2.6 Under the direction of the SA, conduct experiments to validate the HTI design strategies, methodologies, and technologies. Experiments will collect both subjective and objective data to assess the efficacy of a HTI technology. This includes, but is not necessarily limited to:
 - 4.2.6.1 Assisting the SA with the development of behavioural models and the design of the experiment for both simulation and field trials. Independent variables include: system intelligence (e.g., adaptive automation versus conventional), cognitive workload (e.g., low, medium, and high levels of time pressure on operators), and complexity (e.g., task difficulty as a function of mission scenario), etc.
 - 4.2.6.2 Recruit and run participants.
 - 4.2.6.3 Capturing performance and taking effectiveness measurements, including: accuracy in carrying out the mission, number of targets/situations identified within certain time frame, task response time, completion time, attention to certain tasks/targets, and efficiency.
 - 4.2.6.4 Capturing and statistically analysing large data sets (e.g., specifying critical events with time stamps for automatic screen capture and replay, key presses, eye movement, or records of any other input devices) to assess subjects' performance.
 - 4.2.6.5 Measuring workload rating during experiments, including: NASA TLX and Overall Global Workload scales to allow for subjects to rate their workload subjectively.
 - 4.2.6.6 Collecting subjects' comments on HTI technology with a usability questionnaire design and statistical analyses.
 - 4.2.6.7 Analysing all collected data and technically editing and reporting on the findings in a scholarly format following the Publication Manual of American Psychological Association.
 - 4.2.6.8 Supporting experimental set-up, field trials, and data collection at DRDC Centres and other CF facilities (e.g., CF base Trenton, Gagetown, etc.)

5. Required Expertise and Resources

- 5.1 The work will be carried out by a specialist team with demonstrated training in Cognitive Psychology/Human Factors, Computer Science/Computer Engineering, and Knowledge Management or related fields.
- 5.2 The specialist team should have expertise in user interface design, distance training using intelligent tutoring systems, experimental design using human subjects, programming a synthetic virtual environment using multiple development languages (e.g., C++, Java, .NET, MATLAB), scripting languages (Python, shell-script), prototyping tools (SIMULINK), architectures for unmanned systems (e.g., JAUS, ROS), distributed simulation architectures (HLA, DIS) and integrated performance modelling environment (IPME) under both Windows and Linux operating systems. They should also have expertise in various bio-feedback technologies (e.g., tactile, haptic, attention, and stress monitoring systems).
- 5.3 The specialist team must have resources including at least one (1) Senior Researcher, one (1) Specialist Researcher, and two (2) Technical Support Researchers. It is mandatory that the team resources have the qualifications and experience described below.
 - 5.3.1 Senior Researcher: this individual must have a PhD or Post Doctoral training in Cognitive Psychology or Human Factors. This individual must have at least five (5) years experience within the last ten (10) years in relevant work and in leading at least one (1) human factors contract dealing with the development of experimental measures and cognitive metrics for investigating human performance issues. The individual must have experience in design and implementation of Human Factors engineering laboratory for investigating Human-Technology Interaction issues.
 - 5.3.2 Specialist Researcher: the individual must have, at a minimum, a Bachelor's degree in Computer Science or Computer Engineering. The individual must have at least five (5) years of experience within the last ten (10) in software development. The individual must have experience in leading at least one (1) contract dealing with the design and implementation of a testing facility for assessing defence concepts and technologies.
 - 5.3.3 Technical Support Researchers: the individuals must have, at a minimum, a Bachelor's degree in Psychology, or Computer Science, or Computer Engineering, or Knowledge Management, or Technical Communications.
- 5.4 The Contractor must have access to the following items for the duration of the contract: (Comment: These are mandatories and should be listed in Appendix A.

- 5.4.1 Laboratory facilities suitable for testing human participants in behavioral experiments. This includes access to computers powerful enough to conduct experiments using visualization tools.
- 5.4.2 Human participants for laboratory experiments and a means by which ethical approval for the research can be obtained.

6. Meeting

- 6.1 For each Task Authorization issued a kick-off meeting between the Scientific Authority and Contractor will be held at DRDC Toronto no later than two (2) weeks after a tasking starts. The Contractor must provide a preliminary project schedule including tasks, milestones, deliverables, and meetings, for approval by the Scientific Authority.
- 6.2 Progress review meetings for each tasking will be held at the Scientific Authority's discretion at least once every two (2) weeks at DRDC Toronto or at a mutually agreed upon location.
- 6.3 Schedules for each tasking will be negotiated with the Scientific Authority.

7. Travel and Living:

All authority for travel must be obtained from the Scientific Authority and will be subject to Treasury Board travel restrictions and guidelines.

8. Deliverables

- 8.1 The work to be performed will be detailed in DND 626 Task Authorizations on an as and when requested basis. Deliverables will be provided in an electronic format, as applicable and will include, but not be limited to:
 - 8.1.1 Reports documenting the work and the results;
 - 8.1.2 Quantitative and qualitative data sets; all experimental raw data and output, including, but not limited to, all the measurements or dependent variables with synchronized stamps, and video recordings of participants conducting the experiments and being interviewed, etc. that were collected during each experimental investigation will be provided in electronic format suitable for use with spreadsheet and statistical analysis programs, preferably on CD-ROM and/or DVD as mutually agreed.
 - 8.1.3 Government supplied equipment will be provided for the development and experimentation of HTI technologies. However, the Contractor will supply or acquire their own materials and equipment to perform some tasks. All

equipment, hardware, and software or software licenses (if any) purchased as part of the deliverables for each tasking must be returned to the Scientific Authority at DRDC Toronto upon the completion of the tasking.

- 8.1.4 A final Summary Report will be required for each tasking. The report must include a brief background, details of all work items undertaken, and conclusions and recommendations where applicable. The clarity of the written communication in the reports must meet the approval of the Scientific Authority. The contractor must perform technical editing to meet DRDC Toronto and American Psychological Association publication standards and support the publication process. Bibliographies and all references for each tasking need to be stored in an EndNote™ database with detailed information (e.g., author, title, publisher, keywords, abstract, comments, etc.);
- 8.1.5 Reports must be provided in two media formats: two (2) bound copies of each final report; an electronic copy of each report in both Microsoft Word and PDF formats in CD-ROM and/or DVD or by e-mail (where appropriate and accepted by the Scientific Authority). The DRDC report formatting style and outline, provided by the Scientific Authority, will be used for all reports. In addition, the title page of each report must include a DRDC Toronto report number, to be provided by the Scientific Authority following the review of the report, and must contain the following notice:
- © Her Majesty the Queen as represented by the Minister of National Defence, 2013
- © Sa majesté la reine, représentée par le ministre de la Défense nationale, 2013
- 8.1.6 All publications, abstracts, posters, or public presentations as a result of the contract shall be co-authored by the contractor and DRDC Toronto staff who contributed to the project in consultation with the Scientific Authority. All co-authors will have the opportunity to review and approve the documents before they are submitted for publication or public presentation.
- 8.1.7 Design models for each tasking, if there are any;
- 8.1.8 Software programs for each tasking, if there are any;
- 8.1.9 Bi-weekly one or two page progress reports via e-mail for each tasking;
- 8.1.10 Minutes for all project review meetings for each tasking (within five (5) business days after the meetings); and
- 8.1.11 Summary of the meetings with SMEs and experiment subjects for each tasking, if there are any.



**TASK AUTHORIZATION
AUTORISATION DES TÂCHES**

All invoices/progress claims must show the reference Contract and Task numbers. Toutes les factures doivent indiquer les numéros du contrat et de la tâche.		Contract no. - N° du contrat
Amendment no. - N° de la modification	Increase/Decrease - Augmentation/Réduction	Task no. - N° de la tâche
Financial Code		Previous value - Valeur précédente
To - À	<p>TO THE CONTRACTOR You are requested to supply the following services in accordance with the terms of the abovereference contract. Oly services included in the contract shall be supplied against this task. Please advise the undersigned if the completion date cannot be met. Invoices/progress claims shall be prepared in accordance with the instructions set out in the contract.</p> <p>À L'ENTREPRENEUR Vous êtes prié de fournir les services suivants en conformité des termes du contrat mentionnéci-dessus. Seuls les services mentionnés dans le contrat doivent être fournis à l'appui de cette demande. Prièrè d'aviser le signataire si la livraison ne peut se faire dans les délais prescrits. Les factures doivent être établies selon les instructions énoncées dans le contrat.</p> <p style="text-align: center;">_____</p> <p style="text-align: center;">Date</p> <p style="text-align: right;">_____</p> <p style="text-align: right;">for the Department of National Defence pour le ministère de la Défense nationale</p>	
Delivery location - Expédiez à		
Delivery/Completion date - Date de livraison/d'achèvement		
Contract item no. N° d'article du contrat	Services	Cost Prix
		GST/HST TPS/TVH
		Total
<p>APPLICABLE ONLY TO PWGSC CONTRACTS: The Contract Authority signature is required when the total value of the DND 626 exceeds the threshold specified in the contract.</p> <p>NE S'APPLIQUE QU'AUX CONTRATS DE TPSGC : La signature de l'autorité contractante est requise lorsque la valeur totale du formulaire DND 626 est supérieure au seuil précisé dans le contrat.</p> <p style="text-align: center;">_____</p> <p style="text-align: center;">for the Department of Public Works and Government Services pour le ministère des Travaux publics et services gouvernementaux</p>		

Instructions for completing DND 626 - Task Authorization

Contract no.

Enter the PWGSC contract number in full.

Task no.

Enter the sequential Task number.

Amendment no.

Enter the amendment number when the original Task is amended to change the scope or the value.

Increase/Decrease

Enter the increase or decrease total dollar amount including taxes.

Previous value

Enter the previous total dollar amount including taxes.

To

Name of the contractor.

Delivery location

Location where the work will be completed, if other than the contractor's location.

Delivery/Completion date

Completion date for the task.

for the Department of National Defence

Signature of the DND person who has delegated **Authority** for signing DND 626 (level of authority based on the dollar value of the task and the equivalent signing authority in the PAM 1.4). **Note:** the person signing in this block ensures that the work is within the scope of the contract, that sufficient funds remain in the contract to cover this task and that the task is affordable within the Project/Unit budget.

Services

Define the requirement briefly (attach the SOW) and identify the cost of the task using the contractor's quote on the level of effort. The Task must use the basis of payment stipulated in the contract. If there are several basis of payment then list here the one(s) that will apply to the task quote (e.g. milestone payments; per diem rates/labour category hourly rates; travel and living rates; firm price/ceiling price, etc.). All the terms and conditions of the contract apply to this Task Authorization and cannot be ignored or amended for this task. Therefore it is not necessary to restate these general contract terms and conditions on the DND 626 Task form.

Cost

The cost of the Task broken out into the individual costed items in **Services**.

GST/HST

The GST/HST cost as appropriate.

Total

The total cost of the task. The contractor may not exceed this amount without the approval of DND indicated on an amended DND 626. The amendment value may not exceed 50% (or the percentage for amendments established in the contract) of the original value of the task authorization. The total cost of a DND 626, including all amendments, may not exceed the funding limit identified in the contract.

Applicable only to PWGSC contracts

This block only applies to those Task Authorization contracts awarded by PWGSC. The contract will include a specified threshold for DND sole approval of the DND 626 and a percentage for DND to approve amendments to the original DND 626. Tasks that will exceed these thresholds must be passed to the PWGSC Contracting Authority for review and signature prior to authorizing the contractor to begin work.

Instructions pour compléter le formulaire DND 626 - Autorisation des tâches

N° du contrat

Inscrivez le numéro du contrat de TPSGC en entier.

N° de la tâche

Inscrivez le numéro de tâche séquentiel.

N° de la modification

Inscrivez le numéro de modification lorsque la tâche originale est modifiée pour en changer la portée.

Augmentation/Réduction

Inscrivez le montant total de l'augmentation ou de la diminution, y compris les taxes.

Valeur précédente

Inscrivez le montant total précédent, y compris les taxes.

À

Nom de l'entrepreneur.

Expédié à

Endroit où le travail sera effectué, si celui-ci diffère du lieu d'affaires de l'entrepreneur.

Date de livraison/d'achèvement

Date d'achèvement de la tâche.

pour le ministère de la Défense nationale

Signature du représentant du MDN auquel on a délégué le **pouvoir d'approbation** en ce qui a trait à la signature du formulaire DND 626 (niveau d'autorité basé sur la valeur de la tâche et le signataire autorisé équivalent mentionné dans le MAA 1.4). **Nota :** la personne qui signe cette attache de signature confirme que les travaux respectent la portée du contrat, que suffisamment de fonds sont prévus au contrat pour couvrir cette tâche et que le budget alloué à l'unité ou pour le projet le permet.

Services

Définissez brièvement le besoin (joignez l'ET) et établissez le coût de la tâche à l'aide de la soumission de l'entrepreneur selon le niveau de difficulté de celle-ci. Les modalités de paiement stipulées dans le contrat s'appliquent à la tâche. Si plusieurs d'entre elles sont prévues, énumérez ici celle/celles qui s'appliquera/ront à la soumission pour la tâche à accomplir (p.ex. acompte fondé sur les étapes franchies; taux quotidien ou taux horaire établi selon la catégorie de main-d'œuvre; frais de déplacement et de séjour; prix fixe ou prix plafond; etc.). Toutes les modalités du contrat s'appliquent à cette autorisation de tâche et ne peuvent être négligées ou modifiées quant à la tâche en question. Il n'est donc pas nécessaire de répéter ces modalités générales afférentes au contrat sur le formulaire DND 626.

Prix

Mentionnez le coût de la tâche en le répartissant selon les frais afférents à chaque item mentionné dans la rubrique **Services**.

TPS/TVH

Mentionnez le montant de la TPS/TVH, s'il y a lieu.

Total

Mentionnez le coût total de la tâche. L'entrepreneur ne peut dépasser ce montant sans l'approbation du MDN, formulaire DND 626 modifié à l'appui. Le coût de la modification ne peut pas être supérieur à 50 p. 100 du montant initial prévu dans l'autorisation de tâche (ou au pourcentage prévu dans le contrat pour les modifications). Le coût total spécifié dans le formulaire DND 626, y compris toutes les modifications, ne peut dépasser le plafond de financement mentionné dans le contrat.

Ne s'applique qu'aux contrats de TPSGC

Le présent paragraphe s'applique uniquement aux autorisations de tâche accordées par TPSGC. On inscrira dans le formulaire DND 626 un plafond précis qui ne pourra être approuvé que par le MDN et un pourcentage selon lequel le MDN pourra approuver des modifications au formulaire DND 626 original. Les tâches dont le coût dépasse ces plafonds doivent être soumises à l'autorité contractante de TPSGC pour examen et signature avant qu'on autorise l'entrepreneur à débiter les travaux.

ANNEX E

EVALUATION CRITERIA and BASIS OF SELECTION

1.0 EVALUATION CRITERIA

1.1 Mandatory Technical Criteria

At bid closing time, the Bidder must comply with the following mandatory requirements and provide the necessary documentation to support compliance. Any proposal which fails to meet the following mandatory requirements will be deemed non-responsive and no further consideration will be carried out.

ITEM NO	DESCRIPTION	Location in Bid – Page #
1	Senior Researcher (minimum 1, maximum 2). <i>If a Bidder proposes more than 2 resources, evaluators will only evaluate the first 2 resources listed.</i>	
	a. Must have a PhD or Post Doctoral training in Cognitive Psychology or Human Factors.	
	b. This individual must have at least five (5) years experience within the last ten (10) years in relevant work and in leading at least one (1) human factors contract dealing with the development of experimental measures and cognitive metrics for investigating human performance issues.	
	c. Must have experience in the design and implementation of a human factors engineering laboratory for investigating Human-Technology Interaction issues.	
2	Specialist Researcher (minimum 1, maximum 2) <i>If a Bidder proposes more than 2 resources, evaluators will only evaluate the first 2 resources listed.</i>	
	a. Must have at a minimum, a Bachelor's degree in Computer Science or Computer Engineering.	
	b. Must have at least five (5) years of experience within the last ten (10) in software development.	
	c. Must have experience in leading at least one (1) contract dealing with the design and implementation of a testing facility for assessing defence concepts and technologies.	
3	Technical Support Staff (minimum 2, maximum 4) <i>If a Bidder proposes more than 4 resources, evaluators will only evaluate the first 4 resources listed.</i>	
	a. Must have, at minimum, a Bachelor's degree in Psychology, or Computer Science, or Computer Engineering, or Knowledge Management, or Technical Communications.	
4	The Bidder must provide a copy of a curriculum vitae (CV) for each resource proposed in items 1, 2 and 3 above. The CV must include a list of peer-reviewed publications. <i>(Note: CVs will be further assessed under the point-rated criteria.)</i>	
5	The Bidder must demonstrate that they have access to a laboratory facility suitable for testing human participants in behavioral experiments. This includes access to computers powerful enough to conduct experiments using visualization tools	
6	The Bidder must demonstrate that they have access to human participants for laboratory experiments and a means by which ethical approval for the research can be obtained.	

1.2 Point Rated Criteria

1. Technical Proposal (Maximum 30 points): Points may be awarded over the whole range of available points from 1 to 10 points. If a criteria is not addressed it will be given a score of 0).

1.1 Comprehension of tasking scope and objectives (Max. 10 pts)

- The Bidder should demonstrate an understanding of the full and complete scope of tasks and service delivery as described in the SOW.
- The proposal should include a short introduction, with a brief evaluation of the need and objectives of the proposed work, the reasons for carrying it out as proposed, and the benefits to be derived.
- The completeness of the Bidder's understanding and suitability of the services offered by the bidder in meeting the scope of tasks will be assessed. Simply rewording the stated need and background of the Request for Proposal is not sufficient to demonstrate understanding.

1.2 Feasibility of proposed approach and methodology (Max. 10 pts)

- The proposal should clearly outline its approach and proposed methodology to meet the requirements, as well as the degree of success expected.
- The proposed technical approach should be compliant with the requirements as specified in the SOW.
- Sufficient detail should be provided to demonstrate the Bidder's grasp of the requirements and the Bidder's competence to meet it.

1.3 Recognition of problems and proposed solutions (Max. 10 pts)

- The proposal should show recognition of possible problems and propose solutions for handling the requirement to stay within budget and on schedule, determining the level of effort appropriate for each tasking, and the limited availability of resources.
- The proposal should indicate how the bidder will manage its cost in order to stay solvent for the whole duration of the contract.
- The proposal should demonstrate an immediate contingency plan and implementation plan in the event that a resource is no longer available to carry out the work set out in this SOW.

2. Team proposal (Maximum 50 points): Points may be awarded over the whole range of available points from 1 to 10 points or 1 to 20 points, as applicable. If a criteria is not addressed it will be given a score of 0.

A Bidder may propose more than the mandatory number of resources per labour category, up to the maximum specified, in order to receive a full score for experience, however, each proposed resource must meet the mandatory criteria for that particular labour category. Each resource will be evaluated and the overall score will be determined using the combined experience of the proposed resources. For example, a Bidder could receive full marks for the Senior Researcher category, 2.1 below, by proposing two resources whose combined experience meets all of the criteria listed to achieve 20 points.

If a Bidder proposes more than the maximum 2 or 4 resources, evaluators will only evaluate the first 2 or 4 resources listed.

2.1. Qualifications and relevant experience of the Senior Researcher (SR), including his or her position within the organization. (Max. 20 pts)

The proposal should include:

- The name of a Senior Researcher .
- Demonstration of his or her experience, education, and qualifications leading human factors contracts dealing with:
 - development of experimental measures and cognitive metrics for investigating human performance issues;
 - design and implementation of human factors engineering laboratory for investigating Human-Technology Interaction issues;
- Curriculum vitae should include a list of relevant peer-reviewed and other publications, such as:
 - Published books;
 - Peer reviewed journal publications;
 - Conference proceeding papers;

Reports written for human factors contractwork in the areas of a) situation awareness, b) sustained attention, c) human-automation interaction, d) intelligent adaptive system design, and e) intelligent tutoring system design.

2.2. Specialist Researcher capability in software development - relevant experience, qualifications and competence proven by similar or related work. (Max. 15 pts)

The proposal should include:

- The name of a Specialist Researcher
- Experience in leading previous DRDC or another organization's contracts dealing with design and implementation of a testing and evaluation facility.
- Demonstration of his or her experience, developing standalone and companion software to support simulation and modelling, demonstrating in-depth knowledge in all of the following areas:
 - Major programming language, C/C++/C#, JAVA, NET, MATLAB;
 - Prototyping tools: SIMULINK;
 - Scripting Language: Python, shell-script'
 - Client/server systems development;
 - Relational dataases;
 - Software architecture: JAUS, HLA, DIS, ROS;
 - Integrated Performance Modeling Environment (IPME)
 - Windows and Linus operating systems

2.3 Technical Support Staff capability in knowledge management, data collection, software documentation, and technical communications - relevant experience, qualifications and competence proven by similar or related work. (Max. 15 pts).

The proposal should include:

- The names of the Specialist Researchers;
- Demonstration of training in any of the following:
 - knowledge management;
 - Psychology;
 - computer science;
 - computer engineering; or
 - technical writing/communications.
- Demonstration of his or her experience in:
 - knowledge management;
 - data collection;
 - producing scientific documentation, help or user guides for software; and
 - providing technical support for software developed or modified.
 -

3. Management Proposal (Maximum 10 points): Points may be awarded over the whole range of available points from 1 to 10 points. If a criteria is not addressed it will be given a score of 0.

3.1. Bidder's organization, including subcontractors (if applicable) – its relevant experience and competence proven by similar or related work, and resource capability. (Max. 10 pts)

- The proposal should describe the background and relevant experience of it's organization in the activities identified in the SOW, and where applicable, those of the proposed subcontractors, including:
 - experience leading relevant HF contracts for DRDC;
 - experience leading relevant HF contracts for other organizations

Where applicable, the proposal should provide a list of the individual subcontractors and describe the proposed work assignment for the subcontractor.

TOTAL AVAILABLE POINTS: 90 MINIMUM POINTS REQUIRED: 63

2.0 FINANCIAL EVALUATION

Price will be evaluated in accordance with Appendix A to Annex E, Categories of Labour for Evaluation Purposes. 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.

3.0 BASIS OF SELECTION – Highest Combined Rating of Technical Merit and Price

1. To be declared responsive, a bid must:
 - a. comply with all the requirements of the bid solicitation; and
 - b. meet all mandatory criteria; and
 - c. obtain the required minimum of 63 points overall for the technical evaluation criteria which are subject to point rating.

The rating is performed on a scale of 90 points.

2. Bids not meeting (a) or (b) or (c) will be declared non-responsive.
3. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 60% for the technical merit and 40% for the price.
4. To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of 60%.
5. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 40%.
6. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.
7. Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract.

The table below illustrates an example where all three bids are responsive and the selection of the contractor is determined by a 60/40 ratio of technical merit and price, respectively. The total available points equals 135 and the lowest evaluated price is \$45,000 (45).

Basis of Selection - Highest Combined Rating Technical Merit (60%) and Price (40%)			
	Bidder 1	Bidder 2	Bidder 3
Overall Technical Score	115/135	89/135	92/135
Bid Evaluated Price	\$55,000.00	\$50,000.00	\$45,000.00
Calculations			
Technical Merit Score	$115/135 \times 60 = 51.11$	$89/135 \times 60 = 39.55$	$92/135 \times 60 = 40.89$
Pricing Score	$45/55 \times 40 = 32.72$	$45/50 \times 40 = 36.00$	$45/45 \times 40 = 40.00$
Combined Rating	83.83	75.55	80.89
Overall Rating	1st	3rd	2nd

Appendix A of Annex E – Categories of Labour for Evaluation Purposes.

For the purposes of comparing rates, we will take a simple average to estimate an average rate for each of the categories we have identified.

Your position titles may vary, however, you must identify which of the categories would best fit your descriptions.

We will calculate a weighted labour rate using the average hourly rate of the categories and the relative usage as shown below. If more than one labour rate is provided in a category, an average of all rates for that category will be used. The total weighted labour rate for each year will be calculated by adding the weighted labour rate for each category (items 1 to 3) for each year. The total weighted labour rate (WHLR) for years 1 to 3 will be used to determine the aggregate price for evaluation purposes only.

FOR YEAR 1:

Category	Hourly Labour Rate	Categor Average Hourly Rate		Category Weight	Weighed Hourly Labour Rate
Senior Researcher	\$ _____	\$ _____	X	3	\$ _____
	\$ _____				
Specialist Researcher	\$ _____	\$ _____	X	4	\$ _____
	\$ _____				
Technical Support	\$ _____	\$ _____	X	5	\$ _____
	\$ _____				
	\$ _____				
	\$ _____				
		Weighted Hourly Labour Rate for Year 1			\$ _____

FOR YEAR 2

Category	Hourly Labour Rate	Categor Average Hourly Rate		Category Weight	Weighed Hourly Labour Rate
Senior Researcher	\$ _____	\$ _____	X	3	\$ _____
	\$ _____				
Specialist Researcher	\$ _____	\$ _____	X	4	\$ _____
	\$ _____				
Technical Support	\$ _____	\$ _____	X	5	\$ _____
	\$ _____				
	\$ _____				
	\$ _____				
		Weighted Hourly Labour Rate for Year 2			\$ _____

FOR YEAR 3

Category	Hourly Labour Rate	Categor Average Hourly Rate		Category Weight	Weighed Hourly Labour Rate
Senior Researcher	\$ _____	\$ _____	X	3	\$ _____
	\$ _____				
Specialist Researcher	\$ _____	\$ _____	X	4	\$ _____
	\$ _____				
Technical Support	\$ _____	\$ _____	X	5	\$ _____
	\$ _____				
	\$ _____				

	\$ _____				
		Weighted Hourly Labour Rate for Year 3			\$ _____

AGGREGATE PRICE USED IN THE EVALUATION = WHLR YR1 + WHLR YR 2 + WHLR YR 3