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**RETOURNER LES SOUMISSIONS À:**

Bid Receiving - PWGSC/Réception des soumissions  
- TPSGC

11 Laurier St./11, rue Laurier

Place du Portage, Phase III

Core 0B2 / Noyau 0B2

Gatineau

Quebec

K1A 0S5

**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> Operational Research and Analysis System-of-Systems, Operational Research and Analysis (OR&A) and Strategic Analysis	
<b>Solicitation No. - N° de l'invitation</b> W7714-196996/B	<b>Date</b> 2021-01-15
<b>Client Reference No. - N° de référence du client</b> W7714-196996	
<b>GETS Reference No. - N° de référence de SEAG</b> PW-\$\$\$L-017-38918	
<b>File No. - N° de dossier</b> 017sl.W7714-196996	<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> Eastern Standard Time EST <b>on - le 2021-03-04</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 type="checkbox"/> <b>Other-Autre:</b> <input type="checkbox"/>	
<b>Address Enquiries to: - Adresser toutes questions à:</b> Monfette, Annick	<b>Buyer Id - Id de l'acheteur</b> 017sl
<b>Telephone No. - N° de téléphone</b> (873) 355-1907 ( )	<b>FAX No. - N° de FAX</b> ( ) -
<b>Destination - of Goods, Services, and Construction:</b> <b>Destination - des biens, services et construction:</b>  Specified Herein Précisé dans les présentes	

**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**

Defence Science Projects Division/Division des projets des sciences de la défense

Les Terrasses de la Chaudière

10, rue Wellington, 4e étage

Gatineau

Quebec

K1A 0S5

<b>Delivery Required - Livraison exigée</b> See Herein – Voir ci-inclus	<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 (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>

## TABLE OF CONTENTS

<b>PART 1 - GENERAL INFORMATION.....</b>	<b>4</b>
1.1 INTRODUCTION .....	4
1.2 SUMMARY .....	4
1.3 COMMUNICATIONS.....	5
1.4 DEBRIEFINGS.....	5
<b>PART 2 - BIDDER INSTRUCTIONS.....</b>	<b>6</b>
2.1 STANDARD INSTRUCTIONS, CLAUSES AND CONDITIONS.....	6
2.2 SUBMISSION OF BIDS .....	6
2.3 FORMER PUBLIC SERVANT .....	6
2.4 ENQUIRIES - BID SOLICITATION.....	7
2.5 APPLICABLE LAWS.....	7
2.6 IMPROVEMENT OF REQUIREMENT DURING SOLICITATION PERIOD .....	8
2.7 BASIS FOR CANADA'S OWNERSHIP OF INTELLECTUAL PROPERTY .....	8
2.8 BID CHALLENGE AND RECOURSE MECHANISMS.....	8
<b>PART 3 - BID PREPARATION INSTRUCTIONS .....</b>	<b>9</b>
3.1 BID PREPARATION INSTRUCTIONS .....	9
<b>PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION.....</b>	<b>11</b>
4.1 EVALUATION PROCEDURES .....	11
4.2 BASIS OF SELECTION .....	12
<b>PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION.....</b>	<b>34</b>
5.1 CERTIFICATIONS REQUIRED WITH THE BID.....	34
5.2 CERTIFICATIONS PRECEDENT TO CONTRACT AWARD AND ADDITIONAL INFORMATION .....	34
<b>PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS .....</b>	<b>36</b>
6.1 SECURITY REQUIREMENTS .....	36
6.2 CONTROLLED GOODS REQUIREMENT .....	36
<b>PART 7 - RESULTING CONTRACT CLAUSES.....</b>	<b>37</b>
7.1 STATEMENT OF WORK .....	37

---

7.2	STANDARD CLAUSES AND CONDITIONS.....	39
7.3	SECURITY REQUIREMENTS .....	39
7.4	TERM OF CONTRACT .....	40
7.5	AUTHORITIES .....	40
7.6	PROACTIVE DISCLOSURE OF CONTRACTS WITH FORMER PUBLIC SERVANTS .....	42
7.7	PAYMENT .....	42
7.8	INVOICING INSTRUCTIONS .....	44
7.9	CERTIFICATIONS AND ADDITIONAL INFORMATION.....	45
7.10	APPLICABLE LAWS.....	45
7.11	PRIORITY OF DOCUMENTS .....	45
7.12	DEFENCE CONTRACT .....	46
7.13	FOREIGN NATIONALS (CANADIAN CONTRACTOR) .....	46
7.14	INSURANCE .....	46
7.15	CONTROLLED GOODS PROGRAM.....	46
7.16	CANADIAN ARMED FORCES SITE REGULATIONS.....	46
7.17	DISPUTE RESOLUTION.....	46
	<b>ANNEX “A” .....</b>	<b>47</b>
	STATEMENT OF WORK .....	47
	<b>ANNEX “B” .....</b>	<b>66</b>
	BASIS OF PAYMENT .....	66
	<b>ANNEX “C” .....</b>	<b>69</b>
	SECURITY REQUIREMENTS CHECK LIST .....	69
	<b>ANNEX D TO PART 3 OF THE BID SOLICITATION.....</b>	<b>72</b>
	ELECTRONIC PAYMENT INSTRUMENTS.....	72
	<b>ANNEX E TO PART 5 OF THE BID SOLICITATION.....</b>	<b>73</b>
	FEDERAL CONTRACTORS PROGRAM FOR EMPLOYMENT EQUITY – CERTIFICATION.....	73
	<b>ANNEX “F” .....</b>	<b>75</b>
	DND 626, TASK AUTHORIZATION FORM.....	75

Solicitation No. - N° de l'invitation  
W7714-196996/B SL  
Client Ref. No. - N° de réf. du client  
W7714-196996/B

Amd. No. - N° de la modif.  
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017sl – W7714-196996/B

Buyer ID - Id de l'acheteur  
017sl  
CCC No./N° CCC - FMS No./N° VME

---

.....	75
<b>ANNEX G</b> .....	<b>77</b>
NON-DISCLOSURE AGREEMENT .....	77

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## PART 1 - GENERAL INFORMATION

### 1.1 Introduction

The bid solicitation 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 and Additional Information: includes the certifications and additional information to be provided;
- Part 6 Security, Financial and Other 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 Attachments include the Mandatory and Point Rated Technical Criteria, and the Financial Bid Presentation Sheet.

The Annexes include the Statement of Work, the Basis of Payment, the Security Requirements Checklist, the Electronic Payment Instructions, the Federal Contractors Program for Employment Equity - Certification, DND 626 Task Authorization Form, and the Non-Disclosure Agreement.

### 1.2 Summary

- 1.2.1 Defence Research and Development Canada (DRDC) provides integrated science and technology (S&T) advice and technical solutions, performs strategic S&T capability planning, and partners with industry, academia, other government departments (OGDs) and the public safety and national security communities to deliver solutions for the Department of National Defence (DND) and the Canadian Armed Forces (CAF), as well as the public safety and national security communities.

DRDC needs to supplement its capability and capacity by means of contracted support in several service streams.

The objective of this requirement is to establish a contract with a qualified contractor to perform operational research and analysis work on an "as and when requested" basis in the area of concept development, experimentation, modeling and simulation, software tool development, strategic analysis and data collection.

It is Canada's intent to award one (1) contract to satisfy this requirement. The period of any resulting contract will be for three (3) years from date of contract award, with the irrevocable option to extend the term of the contract by up to two (2) additional one (1) year periods under the same conditions.

- 1.2.2 There are security requirements associated with this requirement. For additional information, consult Part 6 - Security, Financial and Other Requirements, and Part 7 - Resulting Contract Clauses. For more information on personnel and organization security screening or security clauses, Bidders should refer to the [Contract Security Program](http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html) of Public Works and Government Services Canada (<http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html>) website.

1.2.3 The requirement is subject to a preference for Canadian services.

1.2.4 This procurement is subject to the Controlled Goods Program. The [Defence Production Act](#) defines Canadian Controlled Goods as certain goods listed in Canada's Export Control List, a regulation made pursuant to the Export and Import Permits Act (EIPA).

1.2.5 The Federal Contractors Program (FCP) for employment equity applies to this procurement; see Part 5 – Certifications and Additional Information, Part 7 - Resulting Contract Clauses and the annex titled Federal Contractors Program for Employment Equity - Certification.

### **1.3 Communications**

As a courtesy and in order to coordinate any public announcements pertaining to this contract, the Government of Canada requests that successful Bidders notify the Contracting Authority (15) days in advance of their intention to make public an announcement related to the recommendation of a contract award, or any information related to the contract. The Government of Canada retains the right to make primary contract announcements.

### **1.4 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 from 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

### 2.1 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 \(https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual\)](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](#) (2020-05-28) 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: (60) days  
Insert: (120) days

### 2.2 Submission of Bids

Bids must be submitted only to the Public Works and Government Services Canada (PWGSC) Bid Receiving Unit 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.

### 2.3 Former Public Servant

Contracts awarded to 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 awarded to FPSs, bidders must provide the information required below before contract award. If the answer to the questions and, as applicable the information required 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 with Canada's request and meet the requirement within the prescribed time frame will render the bid non-responsive.

#### 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 FPSs 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: 2019-01](#) and the [Guidelines on the Proactive Disclosure of Contracts](#).

#### Work Force Adjustment Directive

Is the Bidder a FPS who received a lump sum payment pursuant to the terms of the Work Force Adjustment Directive? **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 adjustment program.

## 2.4 Enquiries - Bid Solicitation

All enquiries must be submitted in writing to the Contracting Authority no later than (15) 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 question(s) or may request that the Bidder do so, so that the proprietary nature of the question(s) is eliminated and the enquiry can be answered to all Bidders. Enquiries not submitted in a form that can be distributed to all Bidders may not be answered by Canada.

## 2.5 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.

## 2.6 Improvement of Requirement during Solicitation Period

Should bidders consider that the specifications or Statement of Work contained in the bid solicitation could be improved technically or technologically, bidders are invited to make suggestions, in writing, to the Contracting Authority named in the bid solicitation. Bidders must clearly outline the suggested improvement as well as the reason for the suggestion. Suggestions that do not restrict the level of competition nor favour a particular bidder will be given consideration provided they are submitted to the Contracting Authority at least (15) days before the bid closing date. Canada will have the right to accept or reject any or all suggestions.

## 2.7 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 as set out in the [Policy on Title to Intellectual Property Arising Under Crown Procurement Contracts](#):

The main purpose of the Contract, or of the deliverables contracted for, is to augment an existing body of Canada's Background information as a prerequisite to the transfer of the expanded Background to the private sector, through licensing or assignment of ownership (not necessarily to the original Contractor), for the purposes of Commercial Exploitation.

## 2.8 Bid Challenge and Recourse Mechanisms

- (a) Several mechanisms are available to potential suppliers to challenge aspects of the procurement process up to and including contract award.
- (b) Canada encourages suppliers to first bring their concerns to the attention of the Contracting Authority. Canada's [Buy and Sell](#) website, under the heading "[Bid Challenge and Recourse Mechanisms](#)" contains information on potential complaint bodies such as:
  - Office of the Procurement Ombudsman (OPO)
  - Canadian International Trade Tribunal (CITT)
- (c) Suppliers should note that there are **strict deadlines** for filing complaints, and the time periods vary depending on the complaint body in question. Suppliers should therefore act quickly when they want to challenge any aspect of the procurement process.

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## PART 3 - BID PREPARATION INSTRUCTIONS

### 3.1 Bid Preparation Instructions

If the Bidder chooses to submit its bid electronically, Canada requests that the Bidder submits its bid in accordance with section 08 of the 2003 standard instructions. The epost Connect system has a limit of 1GB per single message posted and a limit of 20GB per conversation.

The bid must be gathered per section and separated as follows:

- Section I: Technical Bid
- Section II: Financial Bid
- Section III: Certifications
- Section IV: Additional Information

If the Bidder chooses to submit its bid in hard copies, Canada requests that the Bidder submits its bid in separately bound sections as follows:

Section I: Technical Bid – 1 hard copy and 1 soft copy on a CD

Section II: Financial Bid – 1 hard copy and 1 soft copy on a CD

Section III: Certifications – 1 hard copy and 1 soft copy on a CD

If there is a discrepancy between the wording of the soft copy on electronic media 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 hard copy 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 \(https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=32573\)](https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=32573). To assist Canada in reaching its objectives, bidders should:

- a. 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
- b. 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

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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.

Bidders must propose only (1) resource for each labour category and level (i.e. junior, intermediate and senior). At the bid evaluation stage, only (1) resource per category and per level will be evaluated by Canada. Note: Once the Contract is awarded, the Contractor must propose additional resources in response to a Task Authorization. Upon notice through a Task Authorization, the Contractor must provide the name and the supporting documents of each new proposed resource in accordance with Appendix 1 to Annex A – Statement of Work. An evaluation will be conducted by Canada to assess the qualifications of each new proposed resource not previously evaluated.

## **Section II: Financial Bid**

**3.1.1** The Bidder must submit its financial bid in accordance with the Financial Bid Presentation sheet in Attachment 002 under Part 4.

### **3.1.2 Electronic Payment of Invoices – Bid**

If the Bidder is willing to accept payment of invoices by Electronic Payment Instruments, the Bidder must complete Annex “D” Electronic Payment Instruments, to identify which ones are accepted.

If Annex “D” Electronic Payment Instruments is not completed, it will be considered as if Electronic Payment Instruments are not being accepted for payment of invoices.

Acceptance of Electronic Payment Instruments will not be considered as an evaluation criterion.

### **3.1.3 Exchange Rate Fluctuation**

[C3011T](#) (2013-11-06), Exchange Rate Fluctuation

## **Section III: Certifications**

Bidders must submit the certifications required under Part 5.

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## PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

### 4.1 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 two (2) 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 two (2) 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.

#### 4.1.1 Technical Evaluation

Mandatory and point rated technical evaluation criteria are included in Attachment 001 under Part 4.

##### 4.1.1.1 Bidder Experience

###### 4.1.1.1.1 Corporate Experience (ref. MT1.1 and MT1.2 in Attachment 001 under Part 4)

The corporate 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 corporate experience of the Bidder's affiliates (i.e. parent, subsidiary or sister corporations), subcontractors, or suppliers will not be considered.

###### 4.1.1.1.2 Resource Experience (ref. MT2.1- MT2.16 and RT1.0- RT16.0 in Attachment 001 under Part 4)

The experience of the Bidder's affiliates (i.e. parent, subsidiary or sister corporations), subcontractors, or suppliers will be considered in the evaluation of MT2.1 to MT2.16 and RT1.0 to RT16.0. The Bidder must submit the résumés of each individual proposed for each labour category to further demonstrate the individual's experience in response to the mandatory and point rated technical criteria.

##### 4.1.1.2 Supporting Information

In the event that the Bidder fails to submit any supporting information pursuant to the Mandatory and Point Rated Technical, the Contracting Authority may request it thereafter in writing, including after the closing date of the bid solicitation. It is mandatory that the Bidder provide the supporting information within three (3) business days of the written request or within such period as specified or agreed to by the Contracting Authority in the written notice to the Bidder.

#### 4.1.2 Financial Evaluation

##### 4.1.2.1 Evaluation of Price

The bid price will be evaluated in Canadian dollars, Applicable Taxes excluded, Canadian customs duties and excise taxes included.

For evaluation purposes only, the bid price will be determined as detailed in the Financial Bid Presentation \Sheet in Attachment 002 under Part 4.

## 4.2 Basis of Selection

### 4.2.1 Basis of Selection - Highest Combined Rating of Technical Merit (60%) and Price (40%)

*In this clause, Technical Merit refers to the Technical Evaluation Score.*

1. To be declared responsive, a bid **must**:
  - (a) comply with all the requirements of the bid solicitation;
  - (b) meet all mandatory criteria; and
  - (c) obtain the required minimum of **70% percent overall score** for the technical evaluation criteria which are subject to point rating.

The rating is performed on a scale of **385 points**. The overall pass mark is **270 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. The final technical merit score 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, calculated to 2 decimal points.
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. In the event that two or more responsive bids have the same combined rating of technical merit and price, the responsive bid with the lowest evaluated 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).

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**Basis of Selection - Highest Combined Rating Technical Merit (60%) and Price (40%)**

	<b>Bidder</b>		
	<b>Bidder 1</b>	<b>Bidder 2</b>	<b>Bidder 3</b>
<b>Overall Technical Score</b>	120/135	102/135	115/135
<b>Bid Evaluated Price</b>	\$55,000.00	\$50,000.00	\$45,000.00
	<b>Calculations</b>		
<b>Technical Merit Score</b>	120/135 x 60 = 53.33	102/135 x 60 = 45.33	115/135 x 60 = 51.11
<b>Pricing Score</b>	45,000.00/55,000.00 x 40 = 32.73	45,000.00/50,000.00 x 40 = 36.00	45,000.00/45,000.00 x 40 = 40.00
<b>Combined Rating</b>	86.06	81.33	91.11
<b>Overall Rating</b>	<b>2nd</b>	<b>3rd</b>	<b>1st</b>

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## ATTACHMENT 001

### MANDATORY AND POINT RATED TECHNICAL CRITERIA

#### Bid Evaluation Procedures

- a) For each labour category and level, the Bidder must propose only one (1) resource. The Bidder must submit the résumé of the proposed resource to further demonstrate the resource's experience in response to the mandatory and point rated technical criteria.
- b) The Bidder must demonstrate its experience and each proposed resource's experience in terms of months and years. For the purpose of calculating months and years of experience, overlapping experience will only be counted once (e.g. Project #1 time frame is July 2016 to December 2016; Project #2 time frame is October 2016 to January 2017; the total experience for these two project references is seven (7) months).
- c) The Bidder must provide complete details as to where, when and how (through which organization/activities/responsibilities) the stated qualifications/experience were obtained. In order to demonstrate when experience was obtained, the Bidder must indicate the duration of such experience, specifying the start and end dates (month and year at a minimum), as well as a position title, name and contact information (phone number, e-mail) of an Authorized Representative who will confirm the information supplied by the Bidder.
- d) Where the post-secondary degree or diploma was completed and obtained outside of Canada, Canada reserves the right to request a Canadian equivalency document to be provided by the Bidder and issued by recognized academic credentials assessment organization showing the academic level obtained.
- e) Months and years of experience must be calculated going backward from the solicitation closing date.

#### 1. Mandatory Technical Criteria

At bid closing time, the Bidder must comply with the following mandatory technical criteria and provide the necessary documentation to support compliance. Any bid which fails to meet the following mandatory technical criteria will be declared non-responsive. Each criterion should be addressed separately.

##### MT1.0 CORPORATE EXPERIENCE

##### **MT1.1 SERVICE AREAS**

The Bidder must demonstrate a minimum of 2 years' experience within the last 10 years by selecting a combination of at least 3 of the following 5 provision of service areas listed below and detailed in section 6.1 of the "Statement of Work" at Annex A:

1. Concept Development; and/or
2. Experiment and Exercise Design; and/or
3. Experiment and Exercise Conduct; and/or
4. Operational Research and Systems Analysis; and/or
5. Strategic Analysis.

**NOTE:** The experience must have been acquired working with external organizations to the Bidder.

<b>MT1.2</b>	<b>SOFTWARE TOOL DEVELOPMENT</b>
<p>The Bidder must demonstrate a minimum of 4 years' experience within the last 10 years using various software environments (e.g., Python, R, R Studio, JavaScript, C++, C#, VB.Net) in the provision of software services (e.g., mathematical programming, data analytics, modeling and simulation, visualization, database and cloud computing) to support the development and performance (validation, verification and accreditation (VVA)) of Operational Research and Analysis (OR&amp;A) algorithms, applications or scenarios.</p>	

**MT2.0 RESOURCE EXPERIENCE**

The Bidder must provide in its bid submission for each proposed resource a copy of the diploma to demonstrate its education qualification.

<b>MT2.1</b>	<b>SENIOR ACCOUNT MANAGER</b>
<b>MT2.1.1</b>	<p>The proposed resource must demonstrate that it has completed 1 of the following:</p> <p>A degree from a Canadian university or equivalent from a foreign institution in the field of Commerce or Business Administration.</p> <p><b>OR</b></p> <p>Project Management Professional (PMP) certification.</p>
<b>MT2.1.2</b>	The proposed resource must demonstrate that it has obtained a minimum of 8 years' experience in the last 10 years, managing project teams of at least 10 people working on technical projects.
<b>MT2.1.3</b>	The proposed resource must demonstrate a minimum of 8 years' experience in the last 10 years presenting status reports, budget summaries and spending forecasts to management.
<b>MT2.1.4</b>	<p>The proposed resource must demonstrate a minimum of 8 years' experience in the last 10 delivering portfolio project management support to multiple authorized tasks.</p> <p>Experience must include, but not be limited to:</p> <ul style="list-style-type: none"> <li>a. Preparing task proposals in response to task requests detailing: resource attributions, milestones, deliverables, human resources required to execute the task, and all associated costs; and</li> <li>b. Conducting client progress review meetings to discuss overall contract performance, including but not limited to: risk analysis and mitigation strategies, quality assurance, human resources availability to execute the suite of ongoing and new tasks, financial costs, completion rates and invoice reconciliation.</li> </ul>

<b>MT2.2</b>	<b>JUNIOR CONCEPT DEVELOPMENT PROFESSIONAL</b>
<b>MT2.2.1</b>	The proposed resource must demonstrate that it has completed an undergraduate degree from a Canadian University, or equivalent from a foreign institution in the field of Science, Engineering or Social Science.

<b>MT2.2.2</b>	<p>The proposed resource must demonstrate a minimum of 1 year experience total in the last 10 years in any combination of the activities listed below:</p> <ul style="list-style-type: none"> <li>a. Applying a variety of research methods (e.g. literature review, interviews) to determine strategic-level direction relevant to a given domain, and to support defence and security concept development;</li> <li>b. Developing defence and security concepts based on strategic-level direction, as the first step of capability development; and</li> <li>c. Using quantitative and qualitative techniques (e.g. consultation, feedback, benchmarking studies of best practices, modeling and simulation) to assess, evaluate, validate, and refine defence and security concepts for the purpose of further development or experimentation.</li> </ul>
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<b>MT2.3 SENIOR CONCEPT DEVELOPMENT PROFESSIONAL</b>	
<b>MT2.3.1</b>	The proposed resource must demonstrate that it has completed a graduate degree from a Canadian University or equivalent from a foreign institution in the field of Science, Engineering or Social Science.
<b>MT2.3.2</b>	<p>The proposed resource must demonstrate a minimum of 8 years' experience in the last 10 years in the activities listed below:</p> <ul style="list-style-type: none"> <li>a. Deriving implications for force development, force generation, or force employment based on new concepts; and</li> <li>b. Communicating defence and security concepts to stakeholders.</li> </ul>
<b>MT2.3.3</b>	<p>The proposed resource must demonstrate* a minimum 8 years' experience in the last 10 years supervising or managing a team** of resources.</p> <p>*Provide a list and brief summary of all projects in which it functioned in a supervisory and/or management capacity</p> <p>**A team is defined as a minimum of 2 concept developers.</p>

<b>MT2.4 JUNIOR EXPERIMENT AND EXERCISE DESIGN PROFESSIONAL</b>	
<b>MT2.4.1</b>	The proposed resource must demonstrate that it has completed an undergraduate degree from a Canadian University or equivalent from a foreign institution in the field of Science, Engineering or Social Science.

<b>MT2.4.2</b>	<p>The proposed resource must demonstrate a minimum of 1 year experience in the last 5 years in the activities listed below :</p> <ul style="list-style-type: none"> <li>a. Analyzing and refining proposed defence and security concepts to determine experiment or exercise parameters (e.g. objectives and scenario data);</li> <li>b. Analyzing, refining and preparing concepts, including detailed experiment or exercise plans and other supporting documentation for review, revision and final acceptance by stakeholders;</li> <li>c. Using quantitative and qualitative techniques (e.g. survey analysis, focus group summaries, schools of thought analysis, production of descriptive statistics) to analyze the results of an experiment or exercise; and</li> <li>d. Engaging with defence and security stakeholders.</li> </ul>
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<b>MT2.5 SENIOR EXPERIMENT AND EXERCISE DESIGN PROFESSIONAL</b>	
<b>MT2.5.1</b>	The proposed resource must demonstrate that it has completed a graduate degree from a Canadian University or equivalent from a foreign institution in the field of Science, Engineering or Social Science.
<b>MT2.5.2</b>	<p>The proposed resource must demonstrate a minimum of 8 years' experience in the last 10 years in the activities listed below:</p> <ul style="list-style-type: none"> <li>a. Using quantitative and qualitative techniques (e.g. survey analysis, focus group summaries, schools of thought analysis, production of descriptive statistics) to plan and evaluate the success of an experiment or exercise in and of itself, derive implications, and make recommendations for improvements to future exercises or experiments; and</li> <li>b. Communicating exercise or experiment results to stakeholders.</li> </ul>
<b>MT2.5.3</b>	<p>The proposed resource must demonstrate* a minimum 8 years' experience in the last 10 years supervising or managing a team** of resources.</p> <p>*Provide a list and brief summary of all projects in which it functioned in a supervisory and/or management capacity</p> <p>**A team is defined as a minimum of 2 Experiment and Exercise Design Professionals.</p>

<b>MT2.6 JUNIOR EXPERIMENT AND EXERCISE CONDUCT PROFESSIONAL</b>	
<b>MT2.6.1</b>	The proposed resource must demonstrate that it has completed an undergraduate degree from a Canadian University or equivalent from a foreign institution in the field of Science, Engineering or Social Science.

<b>MT2.6.2</b>	<p>The proposed resource must demonstrate a minimum of 1 year experience in the last 10 years in the activities listed below:</p> <ul style="list-style-type: none"> <li>a. Developing training materials for experiment or exercise participants, and administering training to those groups as required;</li> <li>b. Executing (including refereeing as required) an experiment or exercise, including troubleshooting experiments and exercises during their conduct to address any issues that arise;</li> <li>c. Facilitating post-event reviews to elucidate experiment and exercise results and to gather feedback on how to improve future experiments and exercises; and</li> <li>d. Collecting data during and after an experiment or exercise, for example through electronic data collection or the conduct of surveys and interviews.</li> </ul>
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<b>MT2.7 SENIOR EXPERIMENT AND EXERCISE CONDUCT PROFESSIONAL</b>	
<b>MT2.7.1</b>	The proposed resource must demonstrate that it has completed a graduate degree from a Canadian University or equivalent from a foreign institution in the field of Science, Engineering or Social Science.
<b>MT2.7.2</b>	<p>The proposed resource must demonstrate a minimum of 8 years' experience in the last 10 years in the activities listed below:</p> <ul style="list-style-type: none"> <li>a. Using quantitative and qualitative techniques (e.g. survey analysis, focus group summaries, schools of thought analysis, production of descriptive statistics) to evaluate the success of experiments or exercises, derive implications, and make recommendations for improvements to future exercises or experiments; and</li> <li>b. Communicating exercise or experiment results to stakeholders.</li> </ul>
<b>MT2.7.3</b>	<p>The proposed resource must demonstrate* a minimum 8 years' experience in the last 10 years supervising or managing a team** of resources.</p> <p>* Provide a list and brief summary of all projects in which it functioned in a supervisory and/or management capacity</p> <p>**A team is defined as a minimum of 2 Experiment and Exercise Conduct Professionals.</p>

<b>MT2.8 JUNIOR SOFTWARE TOOL DEVELOPMENT PROFESSIONAL</b>	
<b>MT2.8.1</b>	The proposed resource must demonstrate that it has completed an undergraduate degree from a Canadian University or equivalent from a foreign institution in the field of Science, or Engineering.

<b>MT2.8.2</b>	<p>The proposed resource must demonstrate a minimum of 1 year experience in the last 10 years in the activities listed below:</p> <ul style="list-style-type: none"> <li>a. Developing and/or modifying defence and security software tools (e.g., algorithms, applications or scenarios) to accomplish OR&amp;A defined goals within defined parameters, including detailed supporting documentation and training materials; and</li> <li>b. Performing validation, verification, and accreditation (VV&amp;A) of OR&amp;A software tools (e.g., algorithms, applications or scenarios) to ensure that the models are performing as required to deliver required results.</li> </ul>
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<b>MT2.9 INTERMEDIATE SOFTWARE TOOL DEVELOPMENT PROFESSIONAL</b>	
<b>MT2.9.1</b>	The proposed resource must demonstrate that it has completed a graduate degree from a Canadian University or equivalent from a foreign institution in the field of Engineering or Science.
<b>MT2.9.2</b>	<p>The proposed resource must demonstrate a minimum of 4 years' experience in the last 10 years in the activities listed below:</p> <ul style="list-style-type: none"> <li>a. Applying a variety of research methods (e.g. literature review, interviews) to determine strategic-level direction relevant to a given OR&amp;A problem for integration into OR&amp;A software tool development (e.g., algorithms, applications or scenarios) objectives and requirements; and</li> <li>b. Developing detailed OR&amp;A software tool plans and designs (e.g., algorithms, applications and scenarios), including validation, verification, and accreditation (VV&amp;A), for review and revision by defence and security stakeholders; and</li> <li>c. Using quantitative and qualitative techniques to analyze OR&amp;A software tool results and derive implications related to OR&amp;A goals, and make recommendations to stakeholders' regarding these goals.</li> </ul>

<b>MT2.10 SENIOR SOFTWARE TOOL DEVELOPMENT PROFESSIONAL</b>	
<b>MT2.10.1</b>	The proposed resource must demonstrate that it has completed a graduate degree from a Canadian University or equivalent from a foreign institution in the field of Engineering or Science.
<b>MT2.10.2</b>	<p>The proposed resource must demonstrate a minimum of 8 years' experience in the last 10 years in the activities listed below:</p> <ul style="list-style-type: none"> <li>a. Assessing resource requirements (e.g. time, level of effort, subject matter expertise, financial, performance, scalability, and maintainability) for required OR&amp;A software tool development; and</li> <li>b. Using quantitative and qualitative techniques (e.g. survey analysis, focus group summaries, schools of thought analysis, production of descriptive statistics) to evaluate the success of a given OR&amp;A software tool in and of itself, derive implications, and make recommendations for improvements to future OR&amp;A software tools.</li> </ul>

<b>MT2.10.3</b>	<p>The proposed resource must demonstrate* a minimum 8 years' experience in the last 10 years supervising or managing a team** of resources.</p> <p>* Provide a list and brief summary of all projects in which it functioned in a supervisory and/or management capacity</p> <p>**A team is defined as a minimum of 2 OR&amp;A Software Tool Development Professionals.</p>
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<b>MT2.11 JUNIOR OPERATIONAL RESEARCH AND SYSTEMS ANALYSIS PROFESSIONAL</b>	
<b>MT2.11.1</b>	The proposed resource must demonstrate that it has completed an undergraduate degree from a Canadian University or equivalent from a foreign institution in the field of Science, Engineering or Social Science.
<b>MT2.11.2</b>	<p>The proposed resource must demonstrate that it has obtained a minimum of 1 year experience in the last 10 years in the activities listed below:</p> <ul style="list-style-type: none"> <li>a. Performing data gathering (e.g. literature review, interviews) to determine strategic-level direction relevant to a given operational research problem and integrate into the problem definition, developing operational research objectives and requirements;</li> <li>b. Conceiving and developing detailed operational research plans for review, revision and final acceptance by stakeholders;</li> <li>c. Conducting tasks in support of systems analysis or operational research studies; and</li> <li>d. Executing operational research (e.g. options analysis, optimization, risk analysis) according to approved plans to accomplish defined goals within defined parameters, including analysis of results.</li> </ul>

<b>MT2.12 SENIOR OPERATIONAL RESEARCH AND SYSTEMS ANALYSIS PROFESSIONAL</b>	
<b>MT2.12.1</b>	The proposed resource must demonstrate that it has completed a graduate degree from a Canadian University or equivalent from a foreign institution in the field of Science, Engineering or Social Science.
<b>MT2.12.2</b>	<p>The proposed resource must demonstrate that it has obtained a minimum of 8 years' experience in the last 15 years in the activities listed below:</p> <ul style="list-style-type: none"> <li>a. Assessing resource requirements (e.g. time, level of effort, subject matter expertise, financials) for operational research;</li> <li>b. Conducting systems analysis and/or operational research studies; and</li> <li>c. Analyzing and communicating operational research results to stakeholders.</li> </ul>

<b>MT2.12.3</b>	<p>The proposed resource must demonstrate* a minimum 8 years' experience in the last 10 years supervising or managing a team** of resources.</p> <p>* Provide a list and brief summary of all projects in which it functioned in a supervisory and/or management capacity</p> <p>**A team is defined as a minimum of 2 Operational Research and Systems Analysis Professionals.</p>
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<b>MT2.13 JUNIOR STRATEGIC ANALYSIS PROFESSIONAL</b>	
<b>MT2.13.1</b>	The proposed resource must demonstrate that it has completed a graduate degree from a Canadian University or equivalent from a foreign institution in the field of Science, Social Science or that is has completed a Masters of Arts degree in International Studies from a Canadian University.
<b>MT2.13.2</b>	<p>The proposed resource must demonstrate that it has obtained a minimum of 1 year experience in the last 10 years in the activities listed below:</p> <ul style="list-style-type: none"> <li>a. Performing data gathering (e.g. literature review, interviews) to determine strategic-level direction relevant to a given strategic analysis problem and integrate into the problem definition, developing strategic analysis research objectives and requirements;</li> <li>b. Conceiving and developing detailed strategic analysis research plans for review, revision and final acceptance by stakeholders; and</li> <li>c. Conducting in-depth qualitative and quantitative analyses on specific strategic military and defence subject areas (e.g. national military strategies, warfare concepts, regional analyses), including data gathering (e.g. literature review, interviews) and analysis of results.</li> </ul>

<b>MT2.14 SENIOR STRATEGIC ANALYSIS PROFESSIONAL</b>	
<b>MT2.14.1</b>	The proposed resource must demonstrate that it has completed a graduate degree from a Canadian University or equivalent from a foreign institution in the field of Science, Social Science or that is has completed a Masters of Arts degree in International Studies from a Canadian University.
<b>MT2.14.2</b>	<p>The proposed resource must demonstrate that it has obtained a minimum of 8 years' experience in the last 10 years in the activities listed below:</p> <ul style="list-style-type: none"> <li>a. Assessing resource requirements (e.g. time, level of effort, subject matter expertise, financials) for required strategic analysis; and</li> <li>b. Analyzing and communicating strategic analysis results to stakeholders.</li> </ul>

<b>MT2.14.3</b>	<p>The proposed resource must demonstrate* a minimum 8 years' experience in the last 10 years supervising or managing a team** of resources.</p> <p>* Provide a list and brief summary of all projects in which it functioned in a supervisory and/or management capacity</p> <p>**A team is defined as a minimum of 2 Strategic Analysis Professionals.</p>
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<b>MT2.15 ADMINISTRATION SERVICES AND DATA COLLECTION PROFESSIONAL</b>	
<b>MT2.15.1</b>	The proposed resource must demonstrate that it has completed a diploma from a Canadian college or equivalent from an accredited foreign institution in the field of Science, Engineering or Social Science.
<b>MT2.15.2</b>	<p>The proposed resource must demonstrate that it has obtained a minimum of 1 year experience in the last 10 years in the activities listed below:</p> <ul style="list-style-type: none"> <li>a. Preparing surveys and test materials for distribution;</li> <li>b. Collecting data applying quantitative and qualitative collection techniques (e.g. surveys, questionnaires, physical measurement) during exercises or experiments, performing note-taking in focus groups or facilitated discussions and transcribing the notes to electronic format;</li> <li>c. Compiling and formatting exercises or experiment data for later review; and</li> <li>d. Reviewing and 'cleansing' of survey(s), test data and/or databases.</li> </ul>
<b>MT2.15.3</b>	The proposed resource must also have a minimum of 1 year experience in the past 10 years with both MS Excel and MS Access spreadsheet applications.

<b>MT2.16 TECHNICAL WRITER PROFESSIONAL</b>	
<b>MT2.16.1</b>	The proposed resource must demonstrate that it has completed an undergraduate degree from a Canadian University or equivalent from an accredited foreign institution, in the field of Communications.
<b>MT2.16.2</b>	<p>The proposed resource must demonstrate that it has obtained a minimum of 8 years' experience in the last 10 years in creating and editing project documentation (e.g. user manuals, technical documentation and standards) in support of 2 of the following 5 service areas listed below as detailed in Section 6.0 in the "Statement of Work" at Annex A:</p> <ul style="list-style-type: none"> <li>a. Concept Development;</li> <li>b. Experiment and Exercise Design;</li> <li>c. Experiment and Exercise Conduct;</li> <li>d. Operational Research and Analysis; and/or</li> <li>e. Strategic Analysis.</li> </ul> <p>Note: The experience must have been acquired working with external organizations that are not internal to the Bidder.</p>

Solicitation No. - N° de l'invitation  
W7714-196996/B SL  
Client Ref. No. - N° de réf. du client  
W7714-196996/B

Amd. No. - N° de la modif.  
File No. - N° du dossier  
017sl – W7714-196996/B

Buyer ID - Id de l'acheteur  
017sl  
CCC No./N° CCC - FMS No./N° VME

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<b>MT2.16.3</b>	The proposed resource must also have a minimum of 8 years' experience in the past 10 years in using technical writing software (e.g. MS Word, Adobe, Notepad/Notepad ++, Javascript).
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**2. Point Rated Technical Criteria**

2.1 For each proposed resource, the minimum experience and the minimum years of experience demonstrated to meet the mandatory technical criteria will not be considered in the evaluation of the point rated technical criteria. The point rated technical evaluation will be conducted based on experience and years of experience beyond the minimum requirements for the mandatory technical evaluation.

<b>Point Rated Technical Criteria</b>		
<b>RESOURCE EXPERIENCE</b>		
<b>RT1.0 <u>Senior Account Manager</u></b>	<b>Scoring Method</b>	<b>Maximum Points</b>
<b>Maximum 30 points</b>	Points will be awarded on the following basis:	
<b>RT1.1</b> The proposed resource should demonstrate the preparation of more than 10 proposals in response to a task authorization in the last 10 years that detail the following elements: <ul style="list-style-type: none"> <li>• Scope of Work;</li> <li>• Schedule;</li> <li>• Milestones;</li> <li>• Deliverables; and</li> <li>• Resources (Personnel &amp; Financial) availability</li> </ul>	0-10 proposals = 0 points 11-12 proposals = 5 points 13-14 proposals = 10 points 15 or more proposals = 15 points	15 points
<b>RT1.2</b> The proposed resource should demonstrate experience preparing documentation for and participating in more than 2 client progress review meetings (PRM)s in the last 3 years to present and discuss the following: <ul style="list-style-type: none"> <li>• overall contract performance;</li> <li>• risk analysis and mitigation strategies;</li> <li>• quality assurance;</li> <li>• human resource availability to execute ongoing and new tasks; and</li> <li>• financial costs including completion rates and invoice reconciliation.</li> </ul>	0-2 client PRMs = 0 points 3 client PRMs = 5 points 4 client PRMs= 10 points 5 or more client PRMs = 15 points	15 points

<b><u>RT2.0 Junior Concept Development Professional</u></b>	<b>Scoring Method</b>	<b>Maximum Points</b>
<b>Maximum 15 points</b>	Points will be awarded on the following basis:	
<b>RT2.1</b>  The proposed resource should demonstrate more than 1 year experience within the last 10 years designing an experiment or exercise to test proposed concepts aligned to defined goals and parameters.	1 year or less = 0 points More than 1 year but less than 5 years = 5 points 5 years = 10 points	10 points

<b><u>RT3.0 Senior Concept Development Professional</u></b>	<b>Scoring Method</b>	<b>Maximum Points</b>
<b>Maximum 30 points</b>	Points will be awarded on the following basis:	
<b>RT3.1</b>  The proposed resource should demonstrate more than 5 projects that it had direct experience as a principal concept developer and used quantitative and qualitative techniques to develop strategic level capability development in a defence and security context within the last 10 years.  The experience must be from project start to project completion.	0-5 projects = 0 points 6-7 projects = 5 points 8-9 projects = 10 points 10 or more projects = 15 points	15 points
<b>RT3.2</b>  The proposed resource should demonstrate more than 8 years' experience within the last 10 years supervising or managing a team* of concept developers in all activities defined in Annex A-Statement of Work, Section 6.1.2, "Concept Development"  *A team is defined as a minimum of 2 concept developers.	8 years or less = 0 points More than 8 years but less than 9 years = 5 points 9 years but less than 10 years = 10 points 10 years = 15 points	15 points

<b><u>RT4.0 Junior Experiment &amp; Exercise Design Professional</u></b>	<b>Scoring Method</b>	<b>Maximum Points</b>
<b>Maximum 15 points</b>	Points will be awarded on the following basis:	
<b>RT4.1</b>  The proposed resource should demonstrate more than 1 year experience within the last 5 years designing an experiment or exercise to test proposed concepts aligned to defined goals and parameters.	1 year or less = 0 points More than 1 year but less than 2 years = 5 points 2 years but less than 5 years = 10 points 5 years = 15 points	15 points

<b>RT5.0 Senior Experiment &amp; Exercise Design Professional</b> <b>Maximum 30 points</b>	<b>Scoring Method</b> Points will be awarded on the following basis:	<b>Maximum Points</b>
<b>RT5.1</b> The proposed resource should demonstrate more than 8 years' experience within the last 10 years designing an experiment or exercise to accomplish defined goals within defined parameters, testing proposed concepts and communicating recommendations.	8 years or less = 0 points More than 8 years but less than 9 years = 5 points 9 years but less than 10 years = 10 points 10 years = 15 points	15 points
<b>RT5.2</b> The proposed resource should demonstrate more than 8 years' experience within the last 10 years supervising or managing a team* of Experiment & Exercise Design Professionals in all activities defined in Annex A-Statement of Work, Section 6.1.3, "Experiment and Exercise Design"  *A team is defined as a minimum of 2 design developers.	8 years or less = 0 points More than 8 years but less than 9 years = 5 points 9 years but less than 10 years = 10 points 10 years = 15 points	15 points

<b>RT6.0 Junior Experiment and Exercise Conduct Professional</b> <b>Maximum 15 Points</b>	<b>Scoring Method</b> Points will be awarded on the following basis:	<b>Maximum Points</b>
<b>RT6.1</b> The proposed resource should demonstrate more than 1 year experience within the last 10 years designing an experiment or exercise to test proposed concepts aligned to defined goals and parameters.	1 year or less = 0 points More than 1 year but less than 5 years = 5 points 5 or more years = 10 points	10 Points

<b>RT7.0 Senior Experiment &amp; Exercise Conduct Professional</b> <b>Maximum 30 points</b>	<b>Scoring Method</b> Points will be awarded on the following basis:	<b>Maximum Points</b>
<b>RT7.1</b> The proposed resource should demonstrate more than 5 completed exercises and/or experiments within the last 10 years that it obtained experience using quantitative and qualitative techniques to evaluate the success of the experiments and/or exercises, and provided recommendations for improvements to future experiments or exercises.	0-5 projects = 0 points 6-7 projects = 5 points 8-9 projects = 10 points 10 or more projects = 15 points	15 points
<b>RT7.2</b>		

<p>The proposed resource should demonstrate more than 8 years' experience within the last 10 years supervising or managing a team* of Experiment &amp; Exercise Design Professional in all activities defined in Annex A-Statement of Work, Section 6.1.4, "Experiment and Exercise Conduct"</p> <p>*A team is defined as a minimum of 2 concept developers.</p>	<p>8 years or less = 0 points  More than 8 years but less than 9 years = 5 points  9 years but less than 10 years = 10 points  10 years = 15 points</p>	<p>15 points</p>
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<b>RT8.0 Junior Software Tool Development Professional</b> <b>Maximum 15 points</b>	<b>Scoring Method</b> Points will be awarded on the following basis:	<b>Maximum Points</b>
<b>RT8.1</b> <p>The proposed resource should demonstrate a minimum of 1 year experience as the principal developer and of the successful delivery of more than 5 software tools (e.g., algorithms, applications, or scenarios) within the last 10 years.</p>	<p>0-5 software tools = 0 points  6-7 software tools = 5 points  8-9 software tools = 10 points  10 or more software tools = 15 points</p>	<p>15 points</p>

<b>RT9.0 Intermediate Software Tool Development Professional</b> <b>Maximum 30 points</b>	<b>Scoring Method</b> Points will be awarded on the following basis:	<b>Maximum Points</b>
<b>RT9.1</b> <p>The proposed resource should demonstrate more than 4 years' experience within the last 10 years in applying a variety of research methods (e.g. literature review, interviews) to determine strategic-level direction relevant to a given problem for integration into a software tool development (e.g., algorithms, applications and scenarios) objectives and requirements.</p>	<p>4 years or less = 0 points  More than 4 years but less than 7 years = 5 points  7 years but less than 10 years = 10 points  10 years = 15 points</p>	<p>15 points</p>
<b>RT9.2</b> <p>The proposed resource should demonstrate experience as the principal developer and of the successful delivery of more than 3 detailed software tool plans and designs (e.g., algorithms, applications or scenarios) within the last 10 years.</p>	<p>0-3 software tools = 0 points  4-7 software tools = 5 points  8-10 software tools = 10 points  11 or more software tools = 15 points</p>	<p>15 points</p>

<b>RT10.0 Senior Software Tool Development Professional</b>	<b>Scoring Method</b>	<b>Maximum Points</b>
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<b>Maximum 30 points</b>	Points will be awarded on the following basis:	
<b>RT10.1</b>  The proposed resource should demonstrate more than 8 years' experience within the last 10 years in performing validation, verification and accreditation (VV&A) to ensure software models are performing and delivering required results.	8 years or less = 0 points More than 8 years but less than 9 years = 5 points 9 years but less than 10 years = 10 points 10 years = 15 points	15 points
<b>RT10.2</b>  The proposed resource should demonstrate more than 8 years' experience within the last 10 years supervising or managing a team* of OR&A Software Tool Developers in all activities defined in Annex A-Statement of Work, Section 6.1.5, "OR&A Software Tool Development"  *A team is defined as a minimum of 2 software tool developers.	8 years or less = 0 points More than 8 years but less than 9 years = 5 points 9 years but less than 10 years = 10 points 10 years = 15 points	15 points

<b>RT11.0 Junior Operational Research and Systems Analysis Professional</b>	<b>Scoring Method</b>	<b>Maximum Points</b>
<b>Maximum 15 points</b>	Points will be awarded on the following basis:	
<b>RT11.1</b>  The proposed resource should demonstrate more than 1 year experience within the last 10 years conducting operational research and/or system analysis.	1 year or less = 0 points More than 1 year but less than 5 years = 5 points 5 years = 10 points	10 points

<b>RT12.0 Senior Operational Research and Systems Analysis Professional</b>	<b>Scoring Method</b>	<b>Maximum Points</b>
<b>Maximum 30 points</b>	Points will be awarded on the following basis:	
<b>RT12.1</b>  The proposed resource should demonstrate more than 5 projects within the last 15 years conducting operational research and/or systems analysis studies.	0-5 projects = 0 points 6-7 projects = 5 points 8-9 projects = 10 points 10 or more projects = 15 points	15 points
<b>RT12.2</b>  The proposed resource should demonstrate more than 8 years' experience within the last 15 years supervising or managing a team* of Systems Analysts in all activities defined in Annex A-	8 years or less = 0 points More than 8 years but less than 12 years = 5 points 12 years but less than 15 years = 10 points 15 years = 15 points	15 points

Statement of Work, Section 6.1.6, “Operational Research and Systems Analysis”  *A team is defined as a minimum of two Operational Research and Systems Analysis Professionals.		
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<b>RT13.0 Junior Strategic Analysis Professional</b>	<b>Scoring Method</b>	<b>Maximum Points</b>
<b>Maximum 15 points</b>	Points will be awarded on the following basis:	
<b>RT13.1</b>  The proposed resource should demonstrate more than 1 year experience within the last 10 years performing literature review and research for use in strategic level direction development.	1 year or less = 0 points More than 1 year but less than 5 years = 5 points 5 years = 10 points	10 Points

<b>RT14.0 Senior Strategic Analysis Professional</b>	<b>Scoring Method</b>	<b>Maximum Points</b>
<b>Maximum 30 points</b>	Points will be awarded on the following basis:	
<b>RT14.1</b>  The proposed resource should demonstrate more than 5 projects over the last 10 years integrating strategic level direction, developing strategic analysis objectives and recommendations.	0-5 projects = 0 points 6-7 projects = 5 points 8-9 projects = 10 points 10 or more projects = 15 points	15 points
<b>RT14.2</b>  The proposed resource should demonstrate more than 8 years’ experience within the last 10 years supervising or managing a team* of Strategic Analysis in all activities defined in Annex A-Statement of Work, Section 6.1.7, “Strategic Analysis”  *A team is defined as a minimum of 2 Strategic Analysis Professionals.	8 years or less = 0 points More than 8 years but less than 9 years = 5 points 9 years but less than 10 years = 10 points 10 years = 15 points	15 points

<b>RT15.0 Administration Services and Data Collection Professional</b>	<b>Scoring Method</b>	<b>Maximum Points</b>
<b>Maximum 45 points</b>	Points will be awarded on the following basis:	
<b>RT15.1</b>  The proposed resource should demonstrate more than 5 projects, experiments and/or exercises within the last 10 years where it obtained experience consolidating and transcribing the data into electronic format.	0-5 projects = 0 points 6-7 projects = 5 points 8-9 projects = 10 points 10 or more projects = 15 points	15 points

<p><b>RT15.2</b></p> <p>The proposed resource should demonstrate more than 2 projects within the last 10 years where it obtained experience preparing surveys using an electronic survey tool.</p>	<p>0-2 projects = 0 points  3-4 projects = 5 points  5 projects = 10 points  More than 5 projects = 15 points</p>	<p>15 points</p>
<p><b>RT15.3</b></p> <p>The proposed resource should demonstrate more than 2 projects within the last 10 years where it obtained experience preparing surveys using a pen and pencil method.</p>	<p>0-2 projects = 0 points  3-4 projects = 5 points  5 projects = 10 points  More than 5 projects = 15 points</p>	<p>15 points</p>

<p><b>RT16.0 <u>Technical Writer Professional</u></b></p>	<p><b>Scoring Method</b></p>	<p><b>Maximum Points</b></p>
<p><b>Maximum 30 points</b></p>	<p>Points will be awarded on the following basis:</p>	
<p><b>RT16.1</b></p> <p>The proposed resource should demonstrate experience as the principal writer having <u>created</u> more than 8 technical documents in the English language over the last 10 years in 2 of the following 5 provision of service areas detailed in Section 6.0 of the “Statement of Work” at Annex A:</p> <ul style="list-style-type: none"> <li>a. Concept Development;</li> <li>b. Experiment and Exercise Design;</li> <li>c. Experiment and Exercise Conduct;</li> <li>d. Operational Research and Analysis; and</li> <li>e. Strategic Analysis.</li> </ul>	<p>0-8 documents = 0 points  9 documents = 5 points  10 documents = 10 points  More than 10 documents = 15 points</p>	<p>15 points</p>
<p><b>RT16.2</b></p> <p>The proposed resource should demonstrate experience as the principal <u>editor</u> of more than 8 technical documents in the English language over the last 10 years in 2 of the following 5 provision of service areas detailed in Section 6.0 of the “Statement of Work” at Annex A:</p> <ul style="list-style-type: none"> <li>a. Concept Development; and/or</li> <li>b. Experiment and Exercise Design; and/or</li> <li>c. Experiment and Exercise Conduct; and/or</li> <li>d. Operational Research and Analysis; and/or</li> <li>e. Strategic Analysis.</li> </ul>	<p>0-8 documents = 0 points  9 documents = 5 points  10 documents = 10 points  More than 10 documents = 15 points</p>	<p>15 points</p>

**THE MINIMUM TOTAL SCORE FOR THE POINT RATED TECHNICAL CRITERIA (RT 1.0 TO RT 16.0) IS 283 POINTS.**

The Point Rated Technical Criteria scores are summarised by the following table.

Labour Category and Level	Point Rated Technical Criteria	# of Proposed Resources in Bid	Maximum Points
Senior Account Manager	RT 1.0	1	30 points
Junior Concept Development Professional	RT 2.0	1	10 points
Senior Concept Development Professional	RT 3.0	1	30 points
Junior Experiment and Exercise Design Professional	RT 4.0	1	15 points
Senior Experiment and Exercise Design Professional	RT 5.0	1	30 points
Junior Experiment and Exercise Conduct Professional	RT 6.0	1	10 points
Senior Experiment and Exercise Conduct Professional	RT 7.0	1	30 points
Junior Software Tool Development Professional	RT 8.0	1	15 points
Intermediate Software Tool Development Professional	RT 9.0	1	30 points
Senior Software Tool Development Professional	RT 10.0	1	30 points
Junior Operational Research and Systems Analysis Professional	RT 11.0	1	10 points
Senior Operational Research and Systems Analysis Professional	RT 12.0	1	30 points
Junior Strategic Analysis Professional	RT13.0	1	10 points
Senior Strategic Analysis Professional	RT14.0	1	30 points
Administration Services and Data Collection Professional	RT15.0	1	45 points
Technical Writer Professional	RT16.0	1	30 points
	<b>Maximum score achieved</b>		<b>385</b>
	<b>Minimum score required to meet the 70% overall pass mark</b>		<b>270</b>

**ATTACHMENT 002**

**FINANCIAL BID PRESENTATION SHEET**

**BIDDERS ARE REQUESTED TO QUOTE ONE ALL-INCLUSIVE HOURLY RATE PER LABOUR CATEGORY, PER PERIOD AS DESCRIBED BELOW UNDER ITEM 1.**

1. **LABOUR:** at firm all-inclusive hourly rates, inclusive of overhead and profit, Applicable taxes extra, in accordance with the following:

The estimated level of effort specified under the “*Annual Estimated Level of Effort (Hours)*” column is only an approximation of requirements given in good faith and is provided for financial bid evaluation purposes only. It does not represent a commitment by Canada.

**The services provided by the *Account Manager* are considered, for pricing purposes, as "Overhead and Profit" and as such, must also be included in the all-inclusive hourly rates provided.**

**Total Bid Price for Evaluation Purposes** = Cumulative Total for all work categories (G). Each work category total will be calculated as follows:

Total (G) = (A x B) + (A x C) + (A x D) + (A x E) + (A x F)

		Firm All Inclusive Hourly Rates (Applicable taxes extra)					Estimated Total per Category (G)
		Contract Period			Option Period 1	Option Period 2	
		Year 1	Year 2	Year 3	Year 4	Year 5	
Labour Category	Annual Estimated level of Effort (Hours) (A)**	Firm Hourly Rate (B)	Firm Hourly Rate (C)	Firm Hourly Rate (D)	Firm Hourly Rate (E)	Firm Hourly Rate (F)	
Senior Account Manager	100	Not chargeable					
Junior Concept Development Professional	1050	\$	\$	\$	\$	\$	\$
Senior Concept Development Professional	750	\$	\$	\$	\$	\$	\$
Junior Experiment and Exercise Design Professional	2000	\$	\$	\$	\$	\$	\$
Senior Experiment and Exercise Design Professional	600	\$	\$	\$	\$	\$	\$

Junior Experiment and Exercise Conduct Professional	400	\$	\$	\$	\$	\$	\$
Senior Experiment and Exercise Conduct Professional	200	\$	\$	\$	\$	\$	\$
Junior Software Tool Development Professional	1050	\$	\$	\$	\$	\$	\$
Intermediate Software Tool Development Professional	1050	\$	\$	\$	\$	\$	\$
Senior Software Tool Development Professional	750	\$	\$	\$	\$	\$	\$
Junior Operational Research and Systems Analysis Professional	9000	\$	\$	\$	\$	\$	\$
Senior Operational Research and Systems Analysis Professional	6000	\$	\$	\$	\$	\$	\$
Junior Strategic Analysis Professional	2000	\$	\$	\$	\$	\$	\$
Senior Strategic Analysis Professional	3000	\$	\$	\$	\$	\$	\$
Administration Services and Data Collection Professional	2000	\$	\$	\$	\$	\$	\$
Technical Writer Professional	1800	\$	\$	\$	\$	\$	\$
<b>Total Bid Price for Evaluation Purposes only (Applicable taxes extra)</b>							\$

\*\*The "Annual Estimated Level of Effort" is based on the number of resources listed in Section 7.0 Resource Requirements of Annex A – Statement of Work.

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## PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

Bidders must provide the required certifications and additional information to be awarded a contract.

The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Unless specified otherwise, Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.

The Contracting Authority will have the right to ask for additional information to verify the Bidder's certifications. Failure to comply and to cooperate with any request or requirement imposed by the Contracting Authority will render the bid non-responsive or constitute a default under the Contract.

### 5.1 Certifications Required with the Bid

Bidders must submit the following duly completed certifications as part of their bid.

#### 5.1.1 Integrity Provisions - Declaration of Convicted Offences

In accordance with the Integrity Provisions of the Standard Instructions, all bidders must provide with their bid, **if applicable**, the Integrity declaration form available on the [Forms for the Integrity Regime](http://www.tpsgc-pwgsc.gc.ca/ci-if/declaration-eng.html) website (<http://www.tpsgc-pwgsc.gc.ca/ci-if/declaration-eng.html>), to be given further consideration in the procurement process.

#### 5.1.2 Additional Certifications Required with the Bid

##### 5.1.2.1 Canadian Content Certification

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 services offered are Canadian services, as defined in clause [A3050T](#), may be considered.

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

The Bidder certifies that:

( ) the services offered are Canadian services as defined in paragraph 2 of clause [A3050T](#).

**5.1.2.1.1** SACC *Manual* clause [A3050T](#) (2018-12-06), Canadian Content Definition

### 5.2 Certifications Precedent to Contract Award and Additional Information

The certifications and additional information listed below should be submitted with the bid but may be submitted afterwards. If any of these required certifications or additional information is not completed and submitted as requested, the Contracting Authority will inform the Bidder of a time frame within which to provide the information. Failure to provide the certifications or the additional information listed below within the time frame specified will render the bid non-responsive.

#### 5.2.1 Integrity Provisions – Required Documentation

In accordance with the section titled Information to be provided when bidding, contracting or entering into a real property agreement of the [Ineligibility and Suspension Policy](http://www.tpsgc-pwgsc.gc.ca/ci-) (<http://www.tpsgc-pwgsc.gc.ca/ci->

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[if/politique-policy-eng.html](#)), the Bidder must provide the required documentation, as applicable, to be given further consideration in the procurement process.

## 5.2.2 Federal Contractors Program for Employment Equity - Bid Certification

By submitting a bid, the Bidder certifies that the Bidder, and any of the Bidder's members if the Bidder is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "FCP Limited Eligibility to Bid" list available at the bottom of the page of the [Employment and Social Development Canada \(ESDC\) - Labour's](#) website (<https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html#>).

Canada will have the right to declare a bid non-responsive if the Bidder, or any member of the Bidder if the Bidder is a Joint Venture, appears on the "FCP Limited Eligibility to Bid list at the time of contract award.

Canada will also have the right to terminate the Contract for default if a Contractor, or any member of the Contractor if the Contractor is a Joint Venture, appears on the "[FCP Limited Eligibility to Bid](#)" list during the period of the Contract.

The Bidder must provide the Contracting Authority with a completed annex E titled Federal Contractors Program for Employment Equity - Certification, before contract award. If the Bidder is a Joint Venture, the Bidder must provide the Contracting Authority with a completed annex E titled Federal Contractors Program for Employment Equity - Certification, for each member of the Joint Venture.

## 5.2.3 Additional Certifications Precedent to Contract Award

### 5.2.3.1 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.

### 5.2.3.2 Education and Experience

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

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## PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS

### 6.1 Security Requirements

1. Before award of a contract, the following conditions must be met:

- (a) the Bidder must hold a valid organization security clearance as indicated in Part 7 - Resulting Contract Clauses;
- (b) the Bidder's proposed individuals requiring access to classified or protected information, assets or sensitive work sites must meet the security requirements as indicated in Part 7 - Resulting Contract Clauses; and
- (c) the Bidder must provide the name of all individuals who will require access to classified or protected information, assets or sensitive work sites.

2. Bidders are reminded to obtain the required security clearance promptly. Any delay in the award of a contract to allow the successful Bidder to obtain the required clearance will be at the entire discretion of the Contracting Authority.

3. For additional information on security requirements, Bidders should refer to the [Contract Security Program](http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html) of Public Works and Government Services Canada (<http://www.tpsgc-pwgsc.gc.ca/esc-src/introduction-eng.html>) website.

### 6.2 Controlled Goods Requirement

SACC *Manual* clause [A9130T](#) (2019-11-28) Controlled Goods Program

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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.

### 7.1 Statement of Work

The Contractor must perform the Work in accordance with the Statement of Work at Annex A, as and when requested by Canada during the period of the Contract.

An obligation for any Work will come into force only when a Task Authorization (TA) is approved and issued in accordance with the clause entitled "Task Authorization Process".

#### 7.1.1 Task Authorization

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.

##### 7.1.1.1 Task Authorization Process

- a) The Technical Authority or Procurement Authority will provide the Contractor with a description of the task using the DND 626, Task Authorization Form specified in Annex E.
- b) 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.
- c) The Contractor must provide the Technical Authority, the Procurement Authority and the Contracting Authority, within (14) 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.

In response to each TA, the Contractor must submit the name as well as the supporting documents for each new proposed resource in accordance with Appendix 1 to Annex A – Statement of Work. All new proposed resources that were not evaluated at the time of the bid evaluation will be assessed against mandatory criteria included in Appendix 1 of Annex A – Statement of Work prior to the authorization of a TA.

- d) The Contractor must not commence work until a TA authorized by the Procurement Authority or Contracting Authority (whichever is applicable) 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.

##### 7.1.1.2 Task Authorization Limit

The Procurement Authority may authorize individual task authorizations up to a limit of **\$250,000.00**, Applicable Taxes 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.

### 7.1.1.3 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 5%.

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.

### 7.1.1.4 Periodic Usage Reports - Contracts with Task Authorizations

The Contractor must compile and maintain records on its provision of services to the federal government under authorized Task Authorizations issued under the Contract.

The Contractor must provide this data in accordance with the reporting requirements detailed below. If some data is not available, the reason must be indicated. If services are not provided during a given period, the Contractor must still provide a "nil" report.

The data must be submitted on a quarterly basis period to the Contracting Authority.

The quarterly periods are defined as follows:

- 1st quarter: April 1 to June 30;
- 2nd quarter: July 1 to September 30;
- 3rd quarter: October 1 to December 31; and
- 4th quarter: January 1 to March 31.

The data must be submitted to the Contracting Authority no later than (15) calendar days after the end of the reporting period.

#### Reporting Requirement- Details

A detailed and current record of all authorized tasks must be kept for each contract with a task authorization process. This record must contain:

**For each authorized task:**

- i. the authorized task number or task revision number(s);
- ii. a title or a brief description of each authorized task;

- iii. the total estimated cost specified in the authorized Task Authorization (TA) of each task, exclusive of Applicable Taxes;
- iv. the total amount, exclusive of Applicable Taxes, expended to date against each authorized task;
- v. the start and completion date for each authorized task; and
- vi. the active status of each authorized task, as applicable.

**For all authorized tasks:**

- i. the amount (exclusive of Applicable Taxes) specified in the contract (as last amended, as applicable) as Canada's total liability to the contractor for all authorized TAs; and
- ii. the total amount, exclusive of Applicable Taxes, expended to date against all authorized TAs.

**7.1.1.5 Task Authorization - Department of National Defence**

The administration of the Task Authorization process will be carried out by DRDC. This process includes monitoring, controlling and reporting on expenditures of the contract with task authorizations to the Contracting Authority.

**7.2 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 \(https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual\)](https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual) issued by Public Works and Government Services Canada.

**7.2.1 General Conditions**

[2040](#) (2020-05-28), General Conditions – Research & Development, apply to and form part of the Contract.

**7.2.2 General Conditions – Modifications**

[K3410C](#) (2015-02-25), Canada to Own Intellectual Property Rights in Foreground Information.

**7.2.3 Supplemental General Conditions**

[4002](#) (2010-08-16), Software Development or Modification Services, apply to and form part of the Contract.

**7.2.4 Non-disclosure Agreement**

The Contractor must obtain from its employee(s) or subcontractor(s) the completed and signed non-disclosure agreement, attached at Annex G, and provide it to the Contracting Authority before they are given access to information by or on behalf of Canada in connection with the Work.

**7.3 Security Requirements**

The following security requirements (SRCL and related clauses provided by the Contract Security Program) apply and form part of the Contract.

**7.3.1** The Contractor/Offeror must, at all times during the performance of the Contract/Standing Offer, hold a valid Facility Security Clearance at the level of SECRET, issued by the Contract Security Program (CSP), Public Works and Government Services Canada (PWGSC).

**7.3.2** This contract includes access to Controlled Goods. Prior to access, the contractor must be registered in the Controlled Goods Program of Public Works and Government Services Canada (PWGSC).

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- 7.3.3** The Contractor/Offeror personnel requiring access to CANADIAN or FOREIGN CLASSIFIED information, assets or sensitive site(s) must EACH hold a valid personnel security screening at the level of SECRET, granted or approved by the CSP, PWGSC.
- 7.3.4** The Contractor personnel requiring access to NATO RESTRICTED information or assets must be citizens of a NATO member country or a permanent resident of Canada and EACH hold a valid SECRET or its equivalent, granted or approved by the appropriate delegated NATO Security Authority.
- 7.3.5** The Contractor/Offeror MUST NOT remove any CLASSIFIED information or assets from the identified site(s), and the Contractor/Offeror must ensure that its personnel are made aware of and comply with this restriction.
- 7.3.6** Subcontracts which contain security requirements are NOT to be awarded without the prior written permission of the CSP, PWGSC.
- 7.3.7** The Contractor must complete and submit a Foreign Ownership, Control or Influence (FOCI) Questionnaire and associated documentation identified in the FOCI Guidelines for Organizations prior to contract award to identify whether a third party individual, firm or government can gain unauthorized access to CLASSIFIED FOREIGN information/assets. Public Works and Government Services Canada (PWGSC) will determine if the company is "Not Under FOCI" or "Under FOCI". When an organization is determined to be Under FOCI, PWGSC will ascertain if mitigation measures exist or must be put in place by the company so it can be deemed "Not Under FOCI through Mitigation".
- 7.3.8** The contractor must at all times during the performance of the contract possess a letter from PWGSC identifying the results of the FOCI assessment with a FOCI designation of Not Under FOCI or Not Under FOCI through Mitigation.
- 7.3.9** All changes to Questionnaire and associated FOCI evaluation factors must immediately be submitted to the Industrial Security Sector (ISS) to determine if the changes impact the FOCI designation.
- 7.3.10** The Contractor/Offeror must comply with the provisions of the:
- (a) Security Requirements Check List and security guide (if applicable), attached at Annex C
  - (b) *Industrial Security Manual* (Latest Edition).

## **7.4 Term of Contract**

The period of the Contract is (3) years from date of contract award.

### **7.4.1 Option to Extend the Contract**

The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to (2) additional (1) year period(s) under the same conditions. The Contractor agrees that, during the extended period of the Contract, it will be paid in accordance with the applicable provisions as set out at Annex B the Basis of Payment.

Canada may exercise this option at any time by sending a written notice to the Contractor at least (30) calendar days prior to the Contract expiry date. The option may only be exercised by the Contracting Authority, and will be evidenced for administrative purposes only, through a contract amendment.

## **7.5 Authorities**

### **7.5.1 Contracting Authority**

The Contracting Authority for the Contract is:

Name: Annick Monfette  
Title: Supply Specialist  
Public Works and Government Services Canada  
Acquisitions Branch  
Directorate: Innovation Procurement Directorate (IPD)  
Address: 10 Wellington, St. 4<sup>th</sup> floor, Gatineau, QC K1A 0S5

Telephone: (873) 355-1907  
E-mail address: Annick.monfette@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.

### 7.5.2 Technical Authority

The Technical Authority for the Contract is:

Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Organization: \_\_\_\_\_  
Address: \_\_\_\_\_  
  
Telephone: \_\_\_\_ - \_\_\_\_ - \_\_\_\_  
Facsimile: \_\_\_\_ - \_\_\_\_ - \_\_\_\_  
E-mail address: \_\_\_\_\_

#### **(Information to be inserted at the time of contract award)**

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

### 7.5.3 Contractor's Representative

Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Organization: \_\_\_\_\_  
Address: \_\_\_\_\_  
  
Telephone: \_\_\_\_ - \_\_\_\_ - \_\_\_\_  
Facsimile: \_\_\_\_ - \_\_\_\_ - \_\_\_\_  
E-mail address: \_\_\_\_\_

#### **(Information to be inserted at the time of contract award)**

### 7.5.4 Client Procurement Authority

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The Client Procurement Authority for the Contract is:

Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Organization: \_\_\_\_\_  
Address: \_\_\_\_\_

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

**(Information to be inserted at the time of contract award)**

The Client Procurement Authority is the representative of the department or agency for whom the Work is being carried out under the Contract. The Client Procurement Authority is responsible for the implementation of tools and processes required for the administration of the Contract. The Contractor may discuss administrative matters identified in the Contract with the Client Procurement Authority, however, the Client Procurement Authority has no authority to authorize changes to the scope of the Work. Changes to the scope of Work can only be made through a contract amendment issued by the Contracting Authority.

**7.6 Proactive Disclosure of Contracts with Former Public Servants**

SACC Manual Clause [A3025C](#) (2013-03-21)

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: 2019-01](#) of the Treasury Board Secretariat of Canada.

**7.7 Payment**

**7.7.1 Basis of Payment: Individual task authorizations**

The Contractor will be paid for the Work specified in the authorized task authorization, in accordance with the Basis of payment at Annex B.

Canada's liability to the Contractor under the authorized TA must not exceed the limitation of expenditure specified in the authorized task authorization. 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 task authorization 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.

**7.7.2 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 \$ \_\_\_\_\_ (**amount to be inserted at contract award**) . Customs duties are included and Applicable Taxes are extra.
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 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, 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.

### **7.7.3 Method of Payment**

Payment will be made not more frequently than once a month.

Depending on the method of payment specified in the applicable TA, one of the following method of payment clauses will apply.

#### **7.7.3.1 Single Payment**

Canada will pay the Contractor upon completion and delivery of the Work in accordance with the payment provisions of the Contract if:

- (a) an accurate and complete invoice and any other documents required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- (b) all such documents have been verified by Canada;
- (c) the Work delivered has been accepted by Canada.

#### **7.7.3.2 Progress Payment**

- (a) 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:

- (i) 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;
- (ii) the amount claimed is in accordance with the basis of payment;
- (iii) 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;
- (iv) all certificates appearing on form [PWGSC-TPSGC 1111](#) have been signed by the respective authorized representatives.

- (b) 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.
- (c) 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 over payment resulting from progress payments or otherwise must be refunded promptly to Canada.

#### 7.7.4 Electronic Payment of Invoices – Contract

The Contractor accepts to be paid using any of the following Electronic Payment Instrument(s) in accordance with Annex D:

- a. Visa Acquisition Card;
- b. MasterCard Acquisition Card;
- c. Direct Deposit (Domestic and International);
- d. Electronic Data Interchange (EDI);
- e. Wire Transfer (International Only);
- f. Large Value Transfer System (LVTS) (Over \$25M)

#### 7.7.5 Time Verification

[C0711C](#) (2008-05-12), Time Verification

#### 7.8 Invoicing Instructions

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) the Task Authorization (TA) number;

Each claim must be supported by:

- (a) a list of all expenses, in accordance with the TA;
- (b) a copy of time sheets to support the time claimed;
- (c) a copy of the invoices, receipts, vouchers for all direct expenses, travel and living expenses;
- (d) a copy of the progress report, if applicable.

2. Applicable Taxes 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 Applicable Taxes payable as it was claimed and payable under the previous claims for progress payments.
3. The Contractor must prepare and certify (1) copy of the claim on form [PWGSC-TPSGC 1111](#) and forward it in an electronic format to the Contracting Authority identified under the section entitled "Authorities" of the

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Contract for appropriate certification. Microsoft Word and Portable Document Format (.pdf) formats are acceptable.

The Contracting Authority will then forward the certified claim to the Technical Authority for appropriate certification after inspection and acceptance of the Work takes place. The Technical Authority will then forward the claim for 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 this claim is completed.

## 7.9 Certifications and Additional Information

### 7.9.1 Compliance

Unless specified otherwise, the continuous compliance with the certifications provided by the Contractor in its bid or precedent to contract award, and the ongoing cooperation in providing additional information are conditions of the Contract and failure to comply will constitute the Contractor in default. Certifications are subject to verification by Canada during the entire period of the Contract.

### 7.9.2 Federal Contractors Program for Employment Equity - Default by the Contractor

The Contractor understands and agrees that, when an Agreement to Implement Employment Equity (AIEE) exists between the Contractor and Employment and Social Development Canada (ESDC)-Labour, the AIEE must remain valid during the entire period of the Contract. If the AIEE becomes invalid, the name of the Contractor will be added to the "[FCP Limited Eligibility to Bid](#)" list. The imposition of such a sanction by ESDC will constitute the Contractor in default as per the terms of the Contract.

### 7.9.3 SACC Manual Clauses

[A3060C](#) (2008-05-12), Canadian Content Certification

### 7.10 Applicable Laws

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

### 7.11 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 Supplemental general condition [4002](#) (2010-08-16), Software Development or Modification Services;
- (c) the general conditions [2040](#) (2020-05-28) Research and Development;
- (d) Annex A, Statement of Work;
- (e) Annex B, Basis of Payment;
- (f) Annex C, Security Requirements Check List;
- (g) Annex F, DND 626, Task Authorization Form;
- (h) Annex G, Non-disclosure Agreement;

- (i) the signed Task Authorizations (including all of its annexes, if any);
- (j) the Contractor's bid dated \_\_\_\_\_.

#### **7.12 Defence Contract**

SACC *Manual* clause [A9006C](#) (2012-07-16), Defence Contract

#### **7.13 Foreign Nationals (Canadian Contractor)**

SACC *Manual* clause [A2001C](#) (2006-06-16) Foreign Nationals (Foreign Contractor)

#### **7.14 Insurance**

SACC *Manual* clause [G1005C](#) (2016-01-28), Insurance – No Specific Requirement

#### **7.15 Controlled Goods Program**

SACC *Manual* clause [A9131C](#) (2014-11-27), Controlled Goods Program

SACC *Manual* clause [B4060C](#) (2011-05-16), Controlled Goods

#### **7.16 Canadian Armed Forces 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.

#### **7.17 Dispute Resolution**

- (a) The parties agree to maintain open and honest communication about the Work throughout and after the performance of the contract.
- (b) The parties agree to consult and co-operate with each other in the furtherance of the contract and promptly notify the other party or parties and attempt to resolve problems or differences that may arise.
- (c) If the parties cannot resolve a dispute through consultation and cooperation, the parties agree to consult a neutral third party offering alternative dispute resolution services to attempt to address the dispute.
- (d) Options of alternative dispute resolution services can be found on Canada's Buy and Sell website under the heading "[Dispute Resolution](#)".

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## ANNEX "A"

### STATEMENT OF WORK

#### 1.0 TITLE

System-of-Systems, Operational Research and Analysis (OR&A) and Strategic Analysis (SA) Analytical Support Services for Defence Research and Development Canada (DRDC)

#### 2.0 BACKGROUND

DRDC provides integrated science and technology (S&T) advice and technical solutions, performs strategic S&T-based capability planning, and partners with industry, academia, other government departments (OGDs) and the public safety and national security communities to deliver solutions for the Department of National Defence (DND) and the Canadian Armed Forces (CAF), as well as the public safety and national security communities.

As part of the DRDC organization, the Centre for Operational Research and Analysis (CORA), is the lead centre for OR&A and SA, bringing together the largest group of Canadian Defence OR&A and SA practitioners (approximately 150 civilian and military analysts) located in various Research Centres across Canada. CORA's mandate is to provide objective, timely, credible and scientifically rigorous advice to senior decision-makers in DND/CAF. This advice is mainly applied to the core issues of strategy and policy, force development, capability production (including acquisition), force generation, force employment, force posture and readiness, and security science.

For DRDC, there is also a requirement for system-of-systems analysis to support new strategic focus areas with analytical support services as part of the overall S&T program. For example, Director General Science and Technology Force Employment (DGSTFE) has been the lead for the All Domain Situational Awareness (ADSA) S&T Program and its follow-on for Defence of North America. This S&T Program is responsible for delivering relevant and timely advice on technological solutions for the surveillance and defence in the air, maritime surface, sub-surface cyber and space domains in the approaches to Canada, including in the North. DGSTFE and other DG program leaders leverage the capability and capacity of CORA, other DRDC centres and industry directly for program delivery. Areas of interest include, but are not limited to personnel, space, surveillance, active defence, cyber, command and control, and chemical-biological defence systems.

DRDC, OR&A and SA scientists are frequently involved in breaking down complex military problems into smaller, more manageable components and, wherever possible, use quantitative, qualitative and strategic analysis approaches to gain insights and shed light on the key elements of a decision and capability. To this end, a variety of methodologies are utilized, including closed-form mathematical analysis techniques, multi-criteria decision analysis, risk analysis, cost-effectiveness analysis, modelling and simulation, statistical methods, advanced analytics and heuristic techniques.

In order to accommodate the increasing demand for this type of expertise and work within DRDC, ADM (S&T) needs to supplement its capability and capacity, as well as advance the state of organizational knowledge and application.

#### 3.0 OBJECTIVE

The objective of this requirement is to establish a Task Authorization Contract to provide research and analysis support services to DRDC in the following service areas on an "as-and-when requested" basis:

- a. Account Management;
- b. Concept Development;
- c. Experiment and Exercise Design;
- d. Experiment and Exercise Conduct;
- e. Software Tool Development;

- f. Operational Research and Systems Analysis;
- g. Strategic Analysis;
- h. Administration Services and Data Collection; and
- i. Technical Writer Professional.

#### 4.0 ACRONYMS

ADM	Assistant Deputy Minister
ADSA	All Domain Situational Awareness
CAF	Canadian Armed Forces
CORA	Centre for Operational Research and Analysis
DND	Department of National Defence
DRDC	Defence Research and Development Canada
DGSTFE	Director General Science and Technology Force Employment
M&S	Modelling and Simulation
OGDs	Other government departments
OR&A	Operational Research and Analysis
SA	Strategic Analysis
S&T	Science and Technology
TA	Technical Authority

#### 5.0 APPLICABLE DOCUMENTS AND REFERENCES

AD1 Treasury Board Directive on Travel, Hospitality, Conference and Event Expenditures <https://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=27228>

AD2 Federal Government terminology and linguistic databank "Termium Plus"  
<https://open.canada.ca/data/en/dataset/94fc74d6-9b9a-4c2e-9c6c-45a5092453aa>

AD3 Defence Terminology Bank "Defence Terminology Manual, Manual of Abbreviations"  
<http://terminology.mil.ca/index-eng.asp#>

AD4 DRDC Publication Manual  
<https://sites.drdc-rddc.gc.ca/orgs/EO/DRDC%20Site%20Pages/Publishing%20Reference%20Manual.aspx>

AD5 The Canadian Style: A Guide to Writing and editing: revised and expanded  
<http://publications.gc.ca/site/eng/68599/publication.html>  
[https://books.google.ca/books/about/The\\_Canadian\\_Style.html?id=s2kb9jJuxzcC](https://books.google.ca/books/about/The_Canadian_Style.html?id=s2kb9jJuxzcC)

AD6 The Chicago Manual of Style, 16th ed.  
[https://arts.pdn.ac.lk/ichss/content/Chicago\\_Manual\\_of\\_Style.pdf](https://arts.pdn.ac.lk/ichss/content/Chicago_Manual_of_Style.pdf)

#### 6.0 TASKS

The following tasks per category of work may be requested through a Task Authorization process.

##### 6.1 Service Areas

The Task Authorization Contractor must provide services on an "as and when requested" basis, in accordance with the Task Authorization process described in the Contract. Tasks may require multiple persons from one or more service areas to perform the general tasks.

### 6.1.1 Account Management

The Contractor must appoint a Senior Account Manager who will perform oversight and overall management of the Contract. The Senior Account Manager will be the single point of contact on behalf of the Contractor for all matters pertaining to the Contract during normal business hours.

This may include, but is not limited to, any extent of the following tasks:

- a. Work with the DRDC TA to address and resolve issues relating to the technical portion of the work for successful delivery;
- b. Provide contract management support, including but not limited to troubleshooting, resolution or clarification to any issues related to the tasking or invoicing process;
- c. Meet regularly (usually via telecom) with the DRDC TA to review the performance on authorized tasks, identify upcoming work requirements, and plan in advance so that resources are available;
- d. Draft and submit to the DRDC TA proposals in response to task authorization(s); and
- e. Maintain a list of all Government Furnished Information (GFI) or Government Furnished Equipment (GFE) as provided by Canada and provide oversight of return to Canada on completion of the task.

### 6.1.2 Concept Development

The Contractor must provide a range of concept development services involving the creation and development of proposed defence and security concepts and scenarios to enable force development (integrated and interdependent processes used to identify, conceptualize and implement necessary changes to existing capabilities or to develop new capabilities), force generation (organize, train and equip forces) and force employment (strategic support).

This may include, but is not limited to, any extent of the following tasks:

#### **6.1.2.1 Junior:**

- a. Apply a variety of research methods (e.g. literature review, interviews) to determine strategic-level direction relevant to a given domain, and to support defence and security concept development;
- b. Develop defence and security concepts based on strategic-level direction, as the first step of capability development; and
- c. Use quantitative and qualitative techniques (e.g. consultation, feedback, benchmarking studies of best practices, modeling and simulation) to assess, evaluate, validate, and refine defence and security concepts for the purpose of further development or experimentation.

#### **6.1.2.2 Senior:**

- a. Derive implications for force development, force generation, or force employment changing to existing concepts or development of newly proposed concepts;
- b. Communicate proposed defence and security concepts to DRDC stakeholders and/or the TA; and

- 
- c. Supervise the Contractor's junior concept developer(s) in any of the activities listed under this service area in accordance with the work requirements detailed in individual task authorizations.

### **6.1.3 Experiment and Exercise Design**

The Contractor must provide a range of experiment and exercise design services involving the creation and development of proposed defence and security concepts and scenarios.

This may include, but is not limited to, any extent of the following tasks:

#### **6.1.3.1 Junior:**

- a. Analyze and refine proposed defence and security concepts to determine experiment or exercise parameters (e.g. objectives and scenario data), including engagement with defence and security stakeholders and/or the DRDC TA detailed in individual task authorization;
- b. Design an experiment or exercise to rigorously test proposed concepts, including detailed experiment or exercise plans and other supporting documentation for review, revision and final acceptance by stakeholders; and
- c. Use quantitative and qualitative techniques (e.g. survey analysis, focus group summaries, schools of thought analysis, production of descriptive statistics) to analyze the results of an experiment or exercise.

#### **6.1.3.2 Senior:**

- a. In conjunction with the Account Manager, assess experiment or exercise requirements with respect to necessary human and financial resources, facilities, and networks;
- b. Use experiment or exercise analyses to derive implications related to experiment or exercise goals, and communicate recommendations to the Technical Authority vis-à-vis these goals; and
- c. Supervise the Contractor's junior experiment and exercise design developer(s) in any of the activities as listed under this service area in accordance with the work requirements detailed in individual task authorizations.

### **6.1.4 Experiment and Exercise Conduct**

The Contractor must provide a range of experiment and exercise conduct services involving the creation and development of future defence and security concepts and scenarios.

This may include, but is not limited to, any extent of the following tasks:

#### **6.1.4.1 Junior:**

- a. Develop training materials in one or both of the Official Languages for experiment or exercise participants, and administer training in either or both official languages to those groups as required. Language requirements if any, will be detailed in the individual task authorization(s);
- b. Observe, guide, troubleshoot and execute (as required) experiments and/or exercises, during their conduct to address issues that arise;

- 
- c. Facilitate post-exercise and post-experiment reviews to clarify and explain results and to gather feedback on how to improve future exercises or experiments; and
  - d. Collect data during and after an experiment or exercise, for example through electronic data collection or the conduct of surveys and interviews.

#### **6.1.4.2 Senior:**

- a. Use quantitative and qualitative techniques (e.g. survey analysis, focus group summaries, schools of thought analysis, production of descriptive statistics) to evaluate the success of an experiment or exercise in and of itself, derive implications, and make recommendations for improvements to future exercises or experiments;
- b. Prepare documentation to communicate exercise or experiment results to the DRDC TA and/or stakeholders which will be detailed in individual task authorization; and
- c. Supervise the Contractor's junior experiment and exercise conduct facilitators in any of the activities listed under the service area based on the work requirements detailed in individual task authorizations.

#### **6.1.5 Software Tool Development**

Using various software environments (e.g., Python, R, R Studio, JavaScript, C++, C#, VB.Net), the Contractor must provide a range of software services (e.g., mathematical programming, data analytics, modeling and simulation, visualization, database and cloud computing) to support the development and performance (validation, verification and accreditation (VVA)) of OR&A algorithms, applications or scenarios.

This may include, but is not limited to, any extent of the following tasks:

##### **6.1.5.1 Junior:**

- a. Develop or modify defence and security software tools (e.g., algorithms, applications or scenarios) to accomplish OR&A defined goals within defined parameters, including detailed supporting documentation and training materials; and
- b. Perform validation, verification, and accreditation (VV&A) of OR&A software tools (e.g., algorithms, applications and scenarios) to ensure that the models are performing as required to deliver required results. The TA will list the parameters when performing VV&A testing.

##### **6.1.5.2 Intermediate:**

- a. Apply a variety of research methods (e.g. literature review, interviews) to determine strategic-level direction relevant to a given OR&A problem for integration into OR&A software tool development (e.g., algorithms, applications and scenarios) objectives and requirements;
- b. Develop detailed OR&A software tool plans and designs (e.g., algorithms, applications and scenarios), including validation, verification, and accreditation (VV&A), for review and revision by defence and security stakeholders; and

- 
- c. Use quantitative and qualitative techniques to analyze OR&A software tool results and derive implications related to OR&A goals, and make recommendations to stakeholders' vis-à-vis these goals.

#### **6.1.5.3 Senior:**

- a. In conjunction with the Account Manager, assess and propose junior/intermediate resource requirements (e.g. time, level of effort, subject matter expertise, financial, performance, scalability, and maintainability) for required OR&A software tool development;
- b. Use quantitative and qualitative techniques (e.g. survey analysis, focus group summaries, schools of thought analysis, production of descriptive statistics) to evaluate the success of a given OR&A software tool in and of itself, derive implications, and make recommendations for improvements to future OR&A software tools;
- c. Perform validation, verification, and accreditation (VV&A) of OR&A software tools to ensure that the models are performing as required and deliver required results. The TA will list the parameters when performing VV&A testing; and
- d. Supervise the Contractor's junior and intermediate software tool developers in any of the work streams listed under this service area based on the work requirements detailed in individual task authorizations.

#### **6.1.6 Operational Research and Systems Analysis**

The Contractor must provide a range of services involving operational research and analysis and overall systems performance services.

This may include, but is not limited to, any extent of the following tasks:

##### **6.1.6.1 Junior:**

- a. Perform data gathering (e.g. literature review, interviews) to determine strategic-level direction relevant to a given operational research problem and integrate into the problem definition, developing operational research objectives and requirements;
- b. Conceive and develop detailed work plans of proposed work for review, revision and final acceptance by stakeholders;
- c. Execute operational research (e.g. options analysis, optimization, risk analysis) and system-of-systems analysis according to approved plans to accomplish defined goals within defined parameters, including analysis of results; and
- d. Gather and analyze data on requirements and measures of performance for various defence and security systems as per the work detailed in the individual task authorization.

##### **6.1.6.2 Senior:**

- a. In conjunction with the Account Manager, assess and propose Junior resource requirements (e.g. time, level of effort, subject matter expertise, financials) for required operational research and systems analysis;

- b. Analyze and communicate operational research and systems analysis results to DRDC stakeholders and/or the TA;
- c. Analyze and report on the overall performance of systems and capabilities both in situation and/or based on proposed architectures and future system concepts and architectures; and
- d. Supervise junior operational research and analysis and engineering professionals in any of the work listed under this service area, and based on the work requirements detailed in individual task authorizations.

### **6.1.7 Strategic Analysis**

The Contractor must provide a range of strategic analysis services.

This may include, but is not limited to, any extent of the following tasks:

#### **6.1.7.1 Junior:**

- a. Perform data gathering (e.g. literature review, interviews) to determine strategic-level direction relevant to a given strategic analysis problem, and integrate into the problem definition, developing strategic analysis research objectives and requirements;
- b. Conceive and develop detailed strategic analysis research plans for review, revision and final acceptance by stakeholders and/or the TA; and
- c. Conduct in-depth qualitative and quantitative analyses on specific strategic military and defence subject areas (e.g. national military strategies, warfare concepts, regional analyses), including data gathering (e.g. literature review, interviews) and analysis of results.

#### **6.1.7.2 Senior:**

- a. In conjunction with the Account Manager, assess and propose junior resource requirements (e.g. time, level of effort, subject matter expertise, financials) for required strategic analysis;
- b. Analyze and Communicate strategic analysis results to DRDC stakeholders; and
- c. Supervise the Contractor's junior strategic analysis professionals in any of the work listed under this service area, and based on the work requirements detailed in individual task authorization.

### **6.1.8 Administration Services and Data Collection Professional**

The Contractor must provide a range of Administration and Data Collection services.

This may include, but is not limited to, any extent of the following tasks:

- a. Prepare surveys and test materials for distribution;
- b. Collect data applying quantitative and qualitative collection techniques (e.g. surveys, questionnaires, physical measurement) during exercises or experiments, and perform note-taking in focus groups or facilitated discussions and transcribing the notes to electronic format;
- c. Compile and format exercise or experiment data for later review;

- d. Review and 'cleansing' of survey or test data and/or databases.

### **6.1.9 Technical Writer Professional**

The Contractor must provide a range of Technical Writing services for the submission of reports.

This may include, but is not limited to, any extent of the following tasks:

- a. Document help text, user manuals, technical documentation, web page content;
- b. Review documentation standards and the existing project documentation;
- c. Determine documentation requirements and makes plans for meeting them;
- d. Gather information concerning the features and functions provided by the developers;
- e. Assess the audience for the documents/manuals which are required and prepare a statement of purpose and scope for each;
- f. Develop a table of content for each document/manual and write or edit the required content;
- g. Investigate the accuracy of the information collected by making direct use of the material being documented;
- h. Prepare or coordinate the preparation of any required illustrations and diagrams; and
- i. Design the layout of the documents/manuals.

## 7.0 RESOURCE REQUIREMENTS

### Definitions of Levels of Experiences and Levels of Security required

**Junior Professional** (1 year to less than 4 years' experience)  
**Intermediate Professional** (4 years to less than 8 years' experience)  
**Senior Professional** (More than 8 years' experience)

**Level II Security** (Secret level)

Reference from SOW section 6	Resource Category	Levels of Security required	Number of Resource Required	Level of Effort per resource (Hrs/Yr)	Total Expected Level of Effort (Hrs/Yr)
6.1.1	Senior Account Manager	Level II	1	100	100
6.1.2.1	Junior Concept Development Professional	Level II	3	350	1050
6.1.2.2	Senior Concept Development Professional	Level II	2	375	750
6.1.3.1	Junior Experiment and Exercise Design Professional	Level II	4	500	2000
6.1.3.2	Senior Experiment and Exercise Design Professional	Level II	2	300	600
6.1.4.1	Junior Experiment and Exercise Conduct Professional	Level II	4	100	400
6.1.4.2	Senior Experiment and Exercise Conduct Professional	Level II	1	200	200
6.1.5.1	Junior Software Tool Development Professional	Level II	3	350	1050
6.1.5.2	Intermediate Software Tool Development Professional	Level II	2	525	1050
6.1.5.3	Senior Software Tool Development Professional	Level II	2	375	750
6.1.6.1	Junior Operational Research and Systems Analysis Professional	Level II	4	2250	9000
6.1.6.2	Senior Operational Research and Systems Analysis Professional	Level II	4	1500	6000
6.1.7	Junior Strategic Analysis	Level II	4	500	2000
6.1.7.2	Senior Strategic Analysis	Level II	3	1000	3000
6.1.8	Administration Services and Data Collection Professional	Level II	4	500	2000
6.1.9	Technical Writer Professional	Level II	2	900	1800

Appendix 1 to Annex "A" – *Evaluation of Resources* provides the evaluation procedures and qualification requirements of the resources for task authorizations.

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## 8.0 DELIVERABLES

The deliverables to be created and submitted by the Contractor, will be detailed in each task authorization and must be provided to the TA in accordance with the provisions of the task authorization and in accordance with the schedule therein. The conditions of acceptance for the deliverables, and how they must be submitted, will be detailed in each task, and must all be to the satisfaction of Canada.

Although this is not an exhaustive list, the Contractor may create and submit deliverables of the following types:

- a. Feasibility study reports;
- b. Scoping analysis and plans;
- c. Strategic analysis for optimal S&T posture;
- d. Evidence-based policy analysis;
- e. Progress Reports (on tasks longer than 3 months) (Related DID or Template is found at <http://users.csc.calpoly.edu/~jdalbey/205/Mgmt/progressreport.html>)
- f. Analysis Reports (architecture analysis, requirements analysis, operational analysis, human system integration analysis, threat requirements and gaps analysis, risk analysis, capability analysis, performance metrics);
- g. Experimental Plans (such a template will include the following: Project summary, Objectives, Need for research, Scientific Background, Approach & Procedures, Milestones & Outcomes);
- h. Experimental Design for Trial Development (both live and simulation-based);
- i. Configuration and operation of M&S environments for simulation-based scenario driven experiments;
- j. Support to field or simulation-based experimentation;
- k. Experimentation Reports;
- l. Architecture Descriptions (with different sets of views);
- m. Test & Evaluation (T&E) Plans and Reports;
- n. Technology roadmaps;
- o. Capability roadmaps;
- p. Concept of Operations (CONOPS) reports, on how a new innovative technology would be used in an operational capability; and
- q. Business development plans, market analysis, technology transition reports.

## 9.0 MEETINGS

As required, to be identified within the individual tasks.

## 10.0 LOCATION OF WORK

Typically, services will be performed at the Contractor's own place of business; the Contractor must provide adequate work space, office equipment and tools to ensure the uninterrupted flow of services. In some instances, however, services may be performed on-site within the National Capital Region (NCR) or at locations across Canada when field work is necessitated. Any access to classified or restricted or highly sensitive information would be accessed on-site with requirements specified in individual tasks.

## 11.0 GOVERNMENT SUPPLIED MATERIAL (GSM)

To be specified within the individual task authorizations.

## 12.0 GOVERNMENT FURNISHED EQUIPMENT (GFE)

Canada may provide the Contractor with access to GFE and Government Furnished Information (GFI). As required, all GFE and GFI will be identified within task authorizations. The Contractor must track all provided GFE and GFI and must return all items upon completion of the task.

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## APPENDIX 1 TO ANNEX "A" EVALUATION OF RESOURCES

### Evaluation Procedures

- a) In response to each Task Authorization provided by the Technical Authority or the Procurement Authority, the Contractor must propose additional resources according to the specifications of the Task Authorization. Only the additional resources to the ones already evaluated at the bid evaluation stage will be evaluated after Contract award.
- b) The Contractor must submit the résumés of each of the new proposed resource to demonstrate the resource's experience in response to the criteria listed in section Criteria for Resource Qualifications below.
- c) The Contractor must demonstrate each new proposed resource's experience in terms of months and years. For the purpose of calculating months and years of experience, overlapping experience will only be counted once (e.g. Project #1 time frame is July 2016 to December 2016; Project #2 time frame is October 2016 to January 2017; the total experience for these two project references is seven (7) months).
- d) The Contractor must provide complete details as to where, when and how (through which organization/activities/responsibilities) the stated qualifications/experience were obtained. In order to demonstrate when experience was obtained, the Contractor must indicate the duration of such experience, specifying the start and end dates (month and year at a minimum), as well as a position title, name and contact information (phone number, e-mail) of an Authorized Representative who will confirm the information supplied by the Contractor.
- e) Where the post-secondary degree or diploma was completed and obtained outside of Canada, Canada reserves the right to request a Canadian equivalency document to be provided by the Contractor and issued by recognized academic credentials assessment organization showing the academic level obtained.
- f) Years of experience must be calculated going backward from the solicitation closing date.

### Criteria for Resource Qualifications

For each Task Authorization, the Contractor must propose resources who meet the following qualifications and provide the necessary documentation to support compliance. The Contractor must provide a copy of the diploma to demonstrate the education qualification of each proposed resource. Any proposed resource which fails to meet the following mandatory qualifications will be considered non-compliant. Each criterion should be addressed separately.

<b>1 SENIOR ACCOUNT MANAGER</b>	
<b>1.1</b>	The proposed resource must demonstrate that it has completed 1 of the following:  A degree from a Canadian university or equivalent from a foreign institution in the field of Commerce or Business Administration.  <b>OR</b>  Project Management Professional (PMP) certification.
<b>1.2</b>	The proposed resource must demonstrate that it has obtained a minimum of 8 years' experience in the last 10 years, managing project teams of at least 10 people working on technical projects.

<b>1.3</b>	The proposed resource must demonstrate a minimum of 8 years' experience in the last 10 years presenting status reports, budget summaries and spending forecasts to management.
<b>1.4</b>	<p>The proposed resource must demonstrate a minimum of 8 years' experience in the last 10 delivering portfolio project management support to multiple authorized tasks.</p> <p>Experience must include, but not be limited to:</p> <ul style="list-style-type: none"> <li>a. Preparing task proposals in response to task requests detailing: resource attributions, milestones, deliverables, human resources required to execute the task, and all associated costs; and</li> <li>b. Conducting client progress review meetings to discuss overall contract performance, including but not limited to: risk analysis and mitigation strategies, quality assurance, human resources availability to execute the suite of ongoing and new tasks, financial costs, completion rates and invoice reconciliation.</li> </ul>

<b>2 JUNIOR CONCEPT DEVELOPMENT PROFESSIONAL</b>	
<b>2.1</b>	The proposed resource must demonstrate that it has completed an undergraduate degree from a Canadian University, or equivalent from a foreign institution in the field of Science, Engineering or Social Science.
<b>2.2</b>	<p>The proposed resource must demonstrate a minimum of 1 year experience total in the last 10 years in any combination of the activities listed below:</p> <ul style="list-style-type: none"> <li>a. Applying a variety of research methods (e.g. literature review, interviews) to determine strategic-level direction relevant to a given domain, and to support defence and security concept development;</li> <li>b. Developing defence and security concepts based on strategic-level direction, as the first step of capability development; and</li> <li>c. Using quantitative and qualitative techniques (e.g. consultation, feedback, benchmarking studies of best practices, modeling and simulation) to assess, evaluate, validate, and refine defence and security concepts for the purpose of further development or experimentation.</li> </ul>

<b>3 SENIOR CONCEPT DEVELOPMENT PROFESSIONAL</b>	
<b>3.1</b>	The proposed resource must demonstrate that it has completed a graduate degree from a Canadian University or equivalent from a foreign institution in the field of Science, Engineering or Social Science.
<b>3.2</b>	<p>The proposed resource must demonstrate a minimum of 8 years' experience in the last 10 years in the activities listed below:</p> <ul style="list-style-type: none"> <li>a. Deriving implications for force development, force generation, or force employment based on new concepts; and</li> <li>b. Communicating defence and security concepts to stakeholders.</li> </ul>

<b>3.3</b>	<p>The proposed resource must demonstrate* a minimum 8 years' experience in the last 10 years supervising or managing a team** of resources.</p> <p>*Provide a list and brief summary of all projects in which it functioned in a supervisory and/or management capacity</p> <p>**A team is defined as a minimum of 2 concept developers.</p>
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<b>4 JUNIOR EXPERIMENT AND EXERCISE DESIGN PROFESSIONAL</b>	
<b>4.1</b>	The proposed resource must demonstrate that it has completed an undergraduate degree from a Canadian University or equivalent from a foreign institution in the field of Science, Engineering or Social Science.
<b>4.2</b>	<p>The proposed resource must demonstrate a minimum of 1 year experience in the last 5 years in the activities listed below :</p> <ul style="list-style-type: none"> <li>a. Analyzing and refining proposed defence and security concepts to determine experiment or exercise parameters (e.g. objectives and scenario data);</li> <li>b. Analyzing, refining, and developing concepts, including detailed experiment or exercise plans and other supporting documentation for review, revision and final acceptance by stakeholders;</li> <li>c. Using quantitative and qualitative techniques (e.g. survey analysis, focus group summaries, schools of thought analysis, production of descriptive statistics) to analyze the results of an experiment or exercise; and</li> <li>d. Engaging with defence and security stakeholders.</li> </ul>

<b>5 SENIOR EXPERIMENT AND EXERCISE DESIGN PROFESSIONAL</b>	
<b>5.1</b>	The proposed resource must demonstrate that it has completed a graduate degree from a Canadian University or equivalent from a foreign institution in the field of Science, Engineering or Social Science.
<b>5.2</b>	<p>The proposed resource must demonstrate a minimum of 8 years' experience in the last 10 years in the activities listed below:</p> <ul style="list-style-type: none"> <li>a. Using quantitative and qualitative techniques (e.g. survey analysis, focus group summaries, schools of thought analysis, production of descriptive statistics) to plan and evaluate the success of an experiment or exercise in and of itself, derive implications, and make recommendations for improvements to future exercises or experiments; and</li> <li>b. Communicating exercise or experiment results to stakeholders.</li> </ul>

<b>5.3</b>	<p>The proposed resource must demonstrate* a minimum 8 years' experience in the last 10 years supervising or managing a team** of resources.</p> <p>*Provide a list and brief summary of all projects in which it functioned in a supervisory and/or management capacity</p> <p>**A team is defined as a minimum of 2 Experiment and Exercise Design Professionals.</p>
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<b>6 JUNIOR EXPERIMENT AND EXERCISE CONDUCT PROFESSIONAL</b>	
<b>6.1</b>	The proposed resource must demonstrate that it has completed an undergraduate degree from a Canadian University or equivalent from a foreign institution in the field of Science, Engineering or Social Science.
<b>6.2</b>	<p>The proposed resource must demonstrate a minimum of 1 year experience in the last 10 years in the activities listed below:</p> <ul style="list-style-type: none"> <li>a. Developing training materials for experiment or exercise participants, and administering training to those groups as required;</li> <li>b. Executing (including refereeing as required) an experiment or exercise, including troubleshooting experiments and exercises during their conduct to address any issues that arise;</li> <li>c. Facilitating post-event reviews to elucidate experiment and exercise results and to gather feedback on how to improve future experiments and exercises; and</li> <li>d. Collecting data during and after an experiment or exercise, for example through electronic data collection or the conduct of surveys and interviews.</li> </ul>

<b>7 SENIOR EXPERIMENT AND EXERCISE CONDUCT PROFESSIONAL</b>	
<b>7.1</b>	The proposed resource must demonstrate that it has completed a graduate degree from a Canadian University or equivalent from a foreign institution in the field of Science, Engineering or Social Science.
<b>7.2</b>	<p>The proposed resource must demonstrate a minimum of 8 years' experience in the last 10 years in the activities listed below:</p> <ul style="list-style-type: none"> <li>a. Using quantitative and qualitative techniques (e.g. survey analysis, focus group summaries, schools of thought analysis, production of descriptive statistics) to evaluate the success of experiments or exercises, derive implications, and make recommendations for improvements to future exercises or experiments; and</li> <li>b. Communicating exercise or experiment results to stakeholders.</li> </ul>

<b>7.3</b>	<p>The proposed resource must demonstrate* a minimum 8 years' experience in the last 10 years supervising or managing a team** of resources.</p> <p>* Provide a list and brief summary of all projects in which it functioned in a supervisory and/or management capacity</p> <p>**A team is defined as a minimum of 2 Experiment and Exercise Conduct Professionals.</p>
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<b>8 JUNIOR SOFTWARE TOOL DEVELOPMENT PROFESSIONAL</b>	
<b>8.1</b>	The proposed resource must demonstrate that it has completed an undergraduate degree from a Canadian University or equivalent from a foreign institution in the field of Science, or Engineering.
<b>8.2</b>	<p>The proposed resource must demonstrate a minimum of 1 year experience in the last 10 years in the activities listed below:</p> <ul style="list-style-type: none"> <li>a. Developing and/or modifying defence and security software tools (e.g., algorithms, applications or scenarios) to accomplish OR&amp;A defined goals within defined parameters, including detailed supporting documentation and training materials; and</li> <li>b. Performing validation, verification, and accreditation (VV&amp;A) of OR&amp;A software tools (e.g., algorithms, applications or scenarios) to ensure that the models are performing as required to deliver required results.</li> </ul>

<b>9 INTERMEDIATE SOFTWARE TOOL DEVELOPMENT PROFESSIONAL</b>	
<b>9.1</b>	The proposed resource must demonstrate that it has completed a graduate degree from a Canadian University or equivalent from a foreign institution in the field of Engineering or Science.
<b>9.2</b>	<p>The proposed resource must demonstrate a minimum of 4 years' experience in the last 10 years in the activities listed below:</p> <ul style="list-style-type: none"> <li>a. Applying a variety of research methods (e.g. literature review, interviews) to determine strategic-level direction relevant to a given OR&amp;A problem for integration into OR&amp;A software tool development (e.g., algorithms, applications or scenarios) objectives and requirements; and</li> <li>b. Developing detailed OR&amp;A software tool plans and designs (e.g., algorithms, applications and scenarios), including validation, verification, and accreditation (VV&amp;A), for review and revision by defence and security stakeholders; and</li> <li>c. Using quantitative and qualitative techniques to analyze OR&amp;A software tool results and derive implications related to OR&amp;A goals, and make recommendations to stakeholders' regarding these goals.</li> </ul>

<b>10 SENIOR SOFTWARE TOOL DEVELOPMENT PROFESSIONAL</b>	
<b>10.1</b>	The proposed resource must demonstrate that it has completed a graduate degree from a Canadian University or equivalent from a foreign institution in the field of Engineering or Science.
<b>10.2</b>	The proposed resource must demonstrate a minimum of 8 years' experience in the last 10 years in the activities listed below: <ul style="list-style-type: none"> <li>a. Assessing resource requirements (e.g. time, level of effort, subject matter expertise, financial, performance, scalability, and maintainability) for required OR&amp;A software tool development; and</li> <li>b. Using quantitative and qualitative techniques (e.g. survey analysis, focus group summaries, schools of thought analysis, production of descriptive statistics) to evaluate the success of a given OR&amp;A software tool in and of itself, derive implications, and make recommendations for improvements to future OR&amp;A software tools.</li> </ul>
<b>10.3</b>	The proposed resource must demonstrate* a minimum 8 years' experience in the last 10 years supervising or managing a team** of resources. <p>* Provide a list and brief summary of all projects in which it functioned in a supervisory and/or management capacity</p> <p>**A team is defined as a minimum of 2 OR&amp;A Software Tool Development Professionals.</p>

<b>11 JUNIOR OPERATIONAL RESEARCH AND SYSTEMS ANALYSIS PROFESSIONAL</b>	
<b>11.1</b>	The proposed resource must demonstrate that it has completed an undergraduate degree from a Canadian University or equivalent from a foreign institution in the field of Science, Engineering or Social Science.
<b>11.2</b>	The proposed resource must demonstrate that it has obtained a minimum of 1 year experience in the last 10 years in the activities listed below: <ul style="list-style-type: none"> <li>a. Performing data gathering (e.g. literature review, interviews) to determine strategic-level direction relevant to a given operational research problem and integrate into the problem definition, developing operational research objectives and requirements;</li> <li>b. Conceiving and developing detailed operational research plans for review, revision and final acceptance by stakeholders;</li> <li>c. Conducting tasks in support of systems analysis or operational research studies; and</li> <li>d. Executing operational research (e.g. options analysis, optimization, risk analysis) according to approved plans to accomplish defined goals within defined parameters, including analysis of results.</li> </ul>

<b>12 SENIOR OPERATIONAL RESEARCH AND SYSTEMS ANALYSIS PROFESSIONAL</b>	
<b>12.1</b>	The proposed resource must demonstrate that it has completed a graduate degree from a Canadian University or equivalent from a foreign institution in the field of Science, Engineering or Social Science.
<b>12.2</b>	The proposed resource must demonstrate that it has obtained a minimum of 8 years' experience in the last 15 years in the activities listed below: <ul style="list-style-type: none"> <li>a. Assessing resource requirements (e.g. time, level of effort, subject matter expertise, financials) for operational research;</li> <li>b. Conducting systems analysis and/or operational research studies; and</li> <li>c. Analyzing and communicating operational research results to stakeholders.</li> </ul>
<b>12.3</b>	The proposed resource must demonstrate* a minimum 8 years' experience in the last 10 years supervising or managing a team** of resources. <p>* Provide a list and brief summary of all projects in which it functioned in a supervisory and/or management capacity</p> <p>**A team is defined as a minimum of 2 Operational Research and Systems Analysis Professionals.</p>

<b>13 JUNIOR STRATEGIC ANALYSIS PROFESSIONAL</b>	
<b>13.1</b>	The proposed resource must demonstrate that it has completed an undergraduate degree from a Canadian University or equivalent from a foreign institution in the field of Science, Engineering or Social Science.
<b>13.2</b>	The proposed resource must demonstrate that it has obtained a minimum of 1 year experience in the last 10 years in the activities listed below: <ul style="list-style-type: none"> <li>a. Performing data gathering (e.g. literature review, interviews) to determine strategic-level direction relevant to a given strategic analysis problem and integrate into the problem definition, developing strategic analysis research objectives and requirements;</li> <li>b. Conceiving and developing detailed strategic analysis research plans for review, revision and final acceptance by stakeholders; and</li> <li>c. Conducting in-depth qualitative and quantitative analyses on specific strategic military and defence subject areas (e.g. national military strategies, warfare concepts, regional analyses), including data gathering (e.g. literature review, interviews) and analysis of results.</li> </ul>

<b>14 SENIOR STRATEGIC ANALYSIS PROFESSIONAL</b>	
<b>14.1</b>	The proposed resource must demonstrate that it has completed a graduate degree from a Canadian University or equivalent from a foreign institution in the field of Science, Engineering or Social Science.

<b>14.2</b>	<p>The proposed resource must demonstrate that it has obtained a minimum of 8 years' experience in the last 10 years in the activities listed below:</p> <ul style="list-style-type: none"> <li>a. Assessing resource requirements (e.g. time, level of effort, subject matter expertise, financials) for required strategic analysis; and</li> <li>b. Analyzing and communicating strategic analysis results to stakeholders.</li> </ul>
<b>14.3</b>	<p>The proposed resource must demonstrate* a minimum 8 years' experience in the last 10 years supervising or managing a team** of resources.</p> <p>* Provide a list and brief summary of all projects in which it functioned in a supervisory and/or management capacity</p> <p>**A team is defined as a minimum of 2 Strategic Analysis Professionals.</p>

<b>15 ADMINISTRATION SERVICES AND DATA COLLECTION PROFESSIONAL</b>	
<b>15.1</b>	<p>The proposed resource must demonstrate that it has completed a diploma from a Canadian college or equivalent from an accredited foreign institution in the field of Science, Engineering or Social Science.</p>
<b>15.2</b>	<p>The proposed resource must demonstrate that it has obtained a minimum of 1 year experience in the last 10 years in the activities listed below:</p> <ul style="list-style-type: none"> <li>a. Preparing surveys and test materials for distribution;</li> <li>b. Collecting data applying quantitative and qualitative collection techniques (e.g. surveys, questionnaires, physical measurement) during exercises or experiments, performing note-taking in focus groups or facilitated discussions and transcribing the notes to electronic format;</li> <li>c. Compiling and formatting exercises or experiment data for later review; and</li> <li>d. Reviewing and 'cleansing' of survey(s), test data and/or databases.</li> </ul>
<b>15.3</b>	<p>The proposed resource must also have a minimum of 1 year experience in the past 10 years with both MS Excel and MS Access spreadsheet applications.</p>

<b>16 TECHNICAL WRITER PROFESSIONAL</b>	
<b>16.1</b>	<p>The proposed resource must demonstrate that it has completed an undergraduate degree in Communications from a Canadian University or equivalent from a foreign institution.</p>

Solicitation No. - N° de l'invitation  
W7714-196996/B SL  
Client Ref. No. - N° de réf. du client  
W7714-196996/B

Amd. No. - N° de la modif.  
File No. - N° du dossier  
017sl – W7714-196996/B

Buyer ID - Id de l'acheteur  
017sl  
CCC No./N° CCC - FMS No./N° VME

<b>16.2</b>	<p>The proposed resource must demonstrate that it has obtained a minimum of 8 years' experience in the last 10 years in creating and editing project documentation (e.g. user manuals, technical documentation and standards) in support of 2 of the following 5 service areas listed below as detailed in Section 6.0 in the "Statement of Work" at Annex A:</p> <ul style="list-style-type: none"><li>a. Concept Development;</li><li>b. Experiment and Exercise Design;</li><li>c. Experiment and Exercise Conduct;</li><li>d. Operational Research and Analysis; and/or</li><li>e. Strategic Analysis.</li></ul> <p>Note: The experience must have been acquired working with external organizations that are not internal to the Bidder.</p>
<b>16.3</b>	<p>The proposed resource must also have a minimum of 8 years' experience in the past 10 years in using technical writing software (e.g. MS Word, Adobe, Notepad/Notepad ++, Javascript).</p>

**ANNEX “B”**

**BASIS OF PAYMENT**

**1. LABOUR:**

The Contractor will be paid firm all-inclusive hourly rates, inclusive of overhead and profit, as follows, for work performed in accordance with the Contract. Customs duties are included and Applicable taxes are extra, if applicable.

The services provided by the Account Manager are considered, for pricing purposes, a part of “Overhead and Profit,” and the Contractor is not permitted to charge separately, nor is there a labour rate, for the services of the Account Manager.

		Firm All Inclusive Hourly Rates				
		Contract Period			Option Period 1	Option Period 2
		Year 1	Year 2	Year 3	Year 4	Year 5
Labour Category	Annual Estimated Level of Effort (Hours) (A)	Firm Hourly Rate (B)	Firm Hourly Rate (C)	Firm Hourly Rate (D)	Firm Hourly Rate (E)	Firm Hourly Rate (F)
Senior Account Manager	100	Not chargeable				
Junior Concept Development Professional	1050	\$	\$	\$	\$	\$
Senior Concept Development Professional	750	\$	\$	\$	\$	\$
Junior Experiment and Exercise Design Professional	2000	\$	\$	\$	\$	\$
Senior Experiment and Exercise Design Professional	600	\$	\$	\$	\$	\$
Junior Experiment and Exercise Conduct Professional	400	\$	\$	\$	\$	\$
Senior Experiment and Exercise Conduct Professional	200	\$	\$	\$	\$	\$

Junior Software Tool Development Professional	1050	\$	\$	\$	\$	\$
Intermediate Software Tool Development Professional	1050	\$	\$	\$	\$	\$
Senior Software Tool Development Professional	750	\$	\$	\$	\$	\$
Junior Operational Research and Systems Analysis Professional	9000	\$	\$	\$	\$	\$
Senior Operational Research and Systems Analysis Professional	6000	\$	\$	\$	\$	\$
Junior Strategic Analysis Professional	2000	\$	\$	\$	\$	\$
Senior Strategic Analysis Professional	3000	\$	\$	\$	\$	\$
Administration Services and Data Collection Professional	2000	\$	\$	\$	\$	\$
Technical Writer Professional	1800	\$	\$	\$	\$	\$

**TOTAL ESTIMATED LABOUR: \$ \_\_\_\_\_**  
**(Applicable taxes extra)**

**2. TRAVEL AND LIVING EXPENSES:**

- (a) Canada will not accept any travel and living expenses incurred by the Contractor in the performance of the Work, for:
  - (i) services provided within the National Capital Region (NCR). The National Capital Region (NCR) is defined in the [National Capital Act](#), R.S.C. 1985, c.N-4, S.2. The [National Capital Act](#) is available on the Justice Website: <https://laws-lois.justice.gc.ca/fra/lois/n-4/> and
  - (ii) any travel between the Contractor's place of business within the NCR.
- (b) For services to be provided outside the NCR, the Contractor will be reimbursed its authorized travel and living expenses reasonably and properly incurred in the performance of the Work, at cost, without any allowance for profit and/or administrative overhead, in accordance with the meal, private vehicle and incidental expenses provided in Appendices B, C and D of the Treasury Board Travel Directive (<http://www.njc-cnm.gc.ca/directive/travel-voyage/index-eng.php>), and with the other provisions of the

Solicitation No. - N° de l'invitation  
W7714-196996/B SL  
Client Ref. No. - N° de réf. du client  
W7714-196996/B

Amd. No. - N° de la modif.  
File No. - N° du dossier  
017sl – W7714-196996/B

Buyer ID - Id de l'acheteur  
017sl  
CCC No./N° CCC - FMS No./N° VME

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directive referring to “travelers”, rather than those referring to “employees”. The Treasury Board Secretariat’s Special Travel Authorities, <https://www.canada.ca/en/treasury-board-secretariat/services/travel-relocation/special-travel-authorities.html>, also apply.

- (c) Canada will not accept any travel and living expenses incurred by the Contractor as a consequence of any relocation of personnel required to satisfy the terms of this Contract.
- (d) All travel must have prior authorization of the Technical Authority. All payments are subject to government audit.

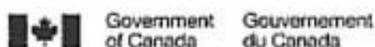
**Est.: \$ TBD in each TA**

**Total Estimated Amount to a Limitation of Expenditure: Refer to Article 7.2 Limitation of Expenditure - Cumulative Total of all Task Authorizations of the Contract’s terms and conditions.**

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"**

**SECURITY REQUIREMENTS CHECK LIST**



Contract Number / Numéro du contrat W7714-196996
Security Classification / Classification de sécurité UNCLASSIFIED

**SECURITY REQUIREMENTS CHECK LIST (SRCL)  
LISTE DE VÉRIFICATION DES EXIGENCES RELATIVES À LA SÉCURITÉ (LVERS)**

PART A - CONTRACT INFORMATION / PARTIE A - INFORMATION CONTRACTUELLE		
1. Originating Government Department or Organization / Ministère ou organisme gouvernemental d'origine DND	2. Branch or Directorate / Direction générale ou Direction ADM SAT	
3. a) Subcontract Number / Numéro du contrat de sous-traitance	3. b) Name and Address of Subcontractor / Nom et adresse du sous-traitant	
4. Brief Description of Work / Brève description du travail Operational Research and Analysis (OR&A) Support Services for Defence Research and Development Canada DRDC		
5. a) Will the supplier require access to Controlled Goods? Le fournisseur aura-t-il accès à des marchandises contrôlées?	<input type="checkbox"/> No / Non <input checked="" type="checkbox"/> Yes / Oui	
5. b) Will the supplier require access to unclassified military technical data subject to the provisions of the Technical Data Control Regulations? Le fournisseur aura-t-il accès à des données techniques militaires non classifiées qui sont assujetties aux dispositions du Règlement sur le contrôle des données techniques?	<input type="checkbox"/> No / Non <input checked="" type="checkbox"/> Yes / Oui	
6. Indicate the type of access required / Indiquer le type d'accès requis		
6. a) Will the supplier and its employees require access to PROTECTED and/or CLASSIFIED information or assets? Le fournisseur ainsi que les employés auront-ils accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS? (Specify the level of access using the chart in Question 7. c.) (Préciser le niveau d'accès en utilisant le tableau qui se trouve à la question 7. c.)	<input type="checkbox"/> No / Non <input checked="" type="checkbox"/> Yes / Oui	
6. b) Will the supplier and its employees (e.g. cleaners, maintenance personnel) require access to restricted access areas? No access to PROTECTED and/or CLASSIFIED information or assets is permitted. Le fournisseur et ses employés (p. ex. nettoyeurs, personnel d'entretien) auront-ils accès à des zones d'accès restreintes? L'accès à des renseignements ou à des biens PROTÉGÉS et/ou CLASSIFIÉS n'est pas autorisé.	<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui	
6. c) Is this a commercial courier or delivery requirement with no overnight storage? S'agit-il d'un contrat de messagerie ou de livraison commerciale sans entreposage de nuit?	<input checked="" type="checkbox"/> No / Non <input type="checkbox"/> Yes / Oui	
7. a) Indicate the type of information that the supplier will be required to access / Indiquer le type d'information auquel le fournisseur devra avoir accès		
Canada <input checked="" type="checkbox"/>	NATO / OTAN <input checked="" type="checkbox"/>	Foreign / Étranger <input checked="" type="checkbox"/>
7. b) Release restrictions / Restrictions relatives à la diffusion		
No release restrictions / Aucune restriction relative à la diffusion <input checked="" type="checkbox"/>	All NATO countries / Tous les pays de l'OTAN <input checked="" type="checkbox"/>	No release restrictions / Aucune restriction relative à la diffusion <input checked="" type="checkbox"/>
Not releasable / À ne pas diffuser <input type="checkbox"/>		
Restricted to: / Limité à: <input type="checkbox"/>	Restricted to: / Limité à: <input type="checkbox"/>	Restricted to: / Limité à: <input type="checkbox"/>
Specify country(ies): / Préciser le(s) pays:	Specify country(ies): / Préciser le(s) pays:	Specify country(ies): / Préciser le(s) pays:
7. c) Level of information / Niveau d'information		
PROTECTED A / PROTÉGÉ A <input type="checkbox"/>	NATO UNCLASSIFIED / NATO NON CLASSIFIÉ <input type="checkbox"/>	PROTECTED A / PROTÉGÉ A <input type="checkbox"/>
PROTECTED B / PROTÉGÉ B <input type="checkbox"/>	NATO RESTRICTED / NATO DIFFUSION RESTREINTE <input checked="" type="checkbox"/>	PROTECTED B / PROTÉGÉ B <input type="checkbox"/>
PROTECTED C / PROTÉGÉ C <input type="checkbox"/>	NATO CONFIDENTIAL / NATO CONFIDENTIEL <input type="checkbox"/>	PROTECTED C / PROTÉGÉ C <input type="checkbox"/>
CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>	NATO SECRET / NATO SECRET <input type="checkbox"/>	CONFIDENTIAL / CONFIDENTIEL <input type="checkbox"/>
SECRET / SECRET <input checked="" type="checkbox"/>	COSMIC TOP SECRET / COSMIC TRÈS SECRET <input type="checkbox"/>	SECRET / SECRET <input checked="" type="checkbox"/>
TOP SECRET / TRÈS SECRET <input type="checkbox"/>		TOP SECRET / TRÈS SECRET <input type="checkbox"/>
TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>		TOP SECRET (SIGINT) / TRÈS SECRET (SIGINT) <input type="checkbox"/>



Contract Number / Numéro du contrat W7714-196996
Security Classification / Classification de sécurité UNCLASSIFIED

**PART A (continued) / PARTIE A (suite)**

8. Will the supplier require access to PROTECTED and/or CLASSIFIED COMSEC information or assets?  
Le fournisseur aura-t-il accès à des renseignements ou à des biens COMSEC désignés PROTÉGÉS et/ou CLASSIFIÉS?  
If Yes, indicate the level of sensitivity.  
Dans l'affirmative, indiquer le niveau de sensibilité :  No  Yes  
Non  Oui

9. Will the supplier require access to extremely sensitive INFOSEC information or assets?  
Le fournisseur aura-t-il accès à des renseignements ou à des biens INFOSEC de nature extrêmement délicate?  
Short Title(s) of material / Titre(s) abrégé(s) du matériel :  
Document Number / Numéro du document :  No  Yes  
Non  Oui

**PART B - PERSONNEL (SUPPLIER) / PARTIE B - PERSONNEL (FOURNISSEUR)**

10. a) Personnel security screening level required / Niveau de contrôle de la sécurité du personnel requis

<input type="checkbox"/> RELIABILITY STATUS COTE DE FIABILITÉ	<input type="checkbox"/> CONFIDENTIAL CONFIDENTIEL	<input checked="" type="checkbox"/> SECRET SECRET	<input type="checkbox"/> TOP SECRET TRÈS SECRET
<input type="checkbox"/> TOP SECRET - SIGINT TRÈS SECRET - SIGINT	<input type="checkbox"/> NATO CONFIDENTIAL NATO CONFIDENTIEL	<input type="checkbox"/> NATO SECRET NATO SECRET	<input type="checkbox"/> COSMIC TOP SECRET COSMIC TRÈS SECRET
<input type="checkbox"/> SITE ACCESS ACCÈS AUX EMPLACEMENTS			

Special comments:  
Commentaires spéciaux : \_\_\_\_\_

NOTE: If multiple levels of screening are identified, a Security Classification Guide must be provided.  
REMARQUE : Si plusieurs niveaux de contrôle de sécurité sont requis, un guide de classification de la sécurité doit être fourni.

10. b) May unscreened personnel be used for portions of the work?  
Du personnel sans autorisation sécuritaire peut-il se voir confier des parties du travail?  
If Yes, will unscreened personnel be escorted?  
Dans l'affirmative, le personnel en question sera-t-il escorté?  No  Yes  
Non  Oui

**PART C - SAFEGUARDS (SUPPLIER) / PARTIE C - MESURES DE PROTECTION (FOURNISSEUR)**

**INFORMATION / ASSETS / RENSEIGNEMENTS / BIENS**

11. a) Will the supplier be required to receive and store PROTECTED and/or CLASSIFIED information or assets on its site or premises?  
Le fournisseur sera-t-il tenu de recevoir et d'entreposer sur place des renseignements ou des biens PROTÉGÉS et/ou CLASSIFIÉS?  No  Yes  
Non  Oui

11. b) Will the supplier be required to safeguard COMSEC information or assets?  
Le fournisseur sera-t-il tenu de protéger des renseignements ou des biens COMSEC?  No  Yes  
Non  Oui

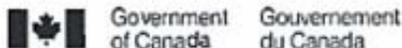
**PRODUCTION**

11. c) Will the production (manufacture, and/or repair and/or modification) of PROTECTED and/or CLASSIFIED material or equipment occur at the supplier's site or premises?  
Les installations du fournisseur serviront-elles à la production (fabrication et/ou réparation et/ou modification) de matériel PROTÉGÉ et/ou CLASSIFIÉ?  No  Yes  
Non  Oui

**INFORMATION TECHNOLOGY (IT) MEDIA / SUPPORT RELATIF À LA TECHNOLOGIE DE L'INFORMATION (TI)**

11. d) Will the supplier be required to use its IT systems to electronically process, produce or store PROTECTED and/or CLASSIFIED information or data?  
Le fournisseur sera-t-il tenu d'utiliser ses propres systèmes informatiques pour traiter, produire ou stocker électroniquement des renseignements ou des données PROTÉGÉS et/ou CLASSIFIÉS?  No  Yes  
Non  Oui

11. e) Will there be an electronic link between the supplier's IT systems and the government department or agency?  
Disposera-t-on d'un lien électronique entre le système informatique du fournisseur et celui du ministère ou de l'agence gouvernementale?  No  Yes  
Non  Oui



Contract Number / Numéro du contrat W7714-196996
Security Classification / Classification de sécurité UNCLASSIFIED

**PART C - (continued) / PARTIE C - (suite)**

For users completing the form manually use the summary chart below to indicate the category(ies) and level(s) of safeguarding required at the supplier's site(s) or premises  
Les utilisateurs qui remplissent le formulaire manuellement doivent utiliser le tableau récapitulatif ci-dessous pour indiquer, pour chaque catégorie, les niveaux de sauvegarde requis aux installations du fournisseur.

For users completing the form online (via the internet), the summary chart is automatically populated by your responses to previous questions  
Dans le cas des utilisateurs qui remplissent le formulaire en ligne (par internet), les réponses aux questions précédentes sont automatiquement saisies dans le tableau récapitulatif.

**SUMMARY CHART / TABLEAU RÉCAPITULATIF**

Category / Catégorie	PROTECTED / PROTÉGÉ			CLASSIFIED / CLASSIFIÉ			NATO				CONSEC					
	A	B	C	CONFIDENTIAL / CONFIDENTIEL	SECRET	TOP SECRET / TRÈS SECRET	RESTRICTED / DIFFUSION RESTRIÉE	CONFIDENTIAL / CONFIDENTIEL	SECRET	CONFIDENTIAL / CONFIDENTIEL	PROTECTED / PROTÉGÉ			CONFIDENTIAL / CONFIDENTIEL	SECRET	TOP SECRET / TRÈS SECRET
											A	B	C			
Information Assets / Ressources d'information / Données																
IT Media / Support TI																
IT Link / Lien électronique																

12. a) Is the description of the work contained within this SRCL PROTECTED and/or CLASSIFIED?  
La description du travail visé par la présente LVERS est-elle de nature PROTÉGÉE et/ou CLASSIFIÉE?  No / Non  Yes / Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification".  
Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire.

12. b) Will the documentation attached to this SRCL be PROTECTED and/or CLASSIFIED?  
La documentation associée à la présente LVERS sera-t-elle PROTÉGÉE et/ou CLASSIFIÉE?  No / Non  Yes / Oui

If Yes, classify this form by annotating the top and bottom in the area entitled "Security Classification" and indicate with attachments (e.g. SECRET with Attachments).  
Dans l'affirmative, classifiez le présent formulaire en indiquant le niveau de sécurité dans la case intitulée « Classification de sécurité » au haut et au bas du formulaire et indiquez qu'il y a des pièces jointes (p. ex. SECRET avec des pièces jointes).

Solicitation No. - N° de l'invitation  
W7714-196996/B SL  
Client Ref. No. - N° de réf. du client  
W7714-196996/B

Amd. No. - N° de la modif.  
File No. - N° du dossier  
017sl – W7714-196996/B

Buyer ID - Id de l'acheteur  
017sl  
CCC No./N° CCC - FMS No./N° VME

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**ANNEX D to PART 3 OF THE BID SOLICITATION**

**ELECTRONIC PAYMENT INSTRUMENTS**

The Bidder accepts to be paid by any of the following Electronic Payment Instrument(s):

- VISA Acquisition Card;
- MasterCard Acquisition Card;
- Direct Deposit (Domestic and International);
- Electronic Data Interchange (EDI);
- Wire Transfer (International Only);
- Large Value Transfer System (LVTS) (Over \$25M)

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## ANNEX E to PART 5 OF THE BID SOLICITATION

### FEDERAL CONTRACTORS PROGRAM FOR EMPLOYMENT EQUITY – CERTIFICATION

I, the Bidder, by submitting the present information to the Contracting Authority, certify that the information provided is true as of the date indicated below. The certifications provided to Canada are subject to verification at all times. I understand that Canada will declare a bid non-responsive, or will declare a contractor in default, if a certification is found to be untrue, whether during the bid evaluation period or during the contract period. Canada will have the right to ask for additional information to verify the Bidder's certifications. Failure to comply with any request or requirement imposed by Canada may render the bid non-responsive or constitute a default under the Contract.

For further information on the Federal Contractors Program for Employment Equity visit [Employment and Social Development Canada \(ESDC\) – Labour's](#) website.

Date: \_\_\_\_\_(YYYY/MM/DD) (If left blank, the date will be deemed to be the bid solicitation closing date.)

Complete both A and B.

A. Check only one of the following:

- A1. The Bidder certifies having no work force in Canada.
- A2. The Bidder certifies being a public sector employer.
- A3. The Bidder certifies being a [federally regulated employer](#) being subject to the [Employment Equity Act](#).
- A4. The Bidder certifies having a combined work force in Canada of less than 100 permanent full-time and/or permanent part-time employees.
- A5. The Bidder has a combined workforce in Canada of 100 or more employees; and
  - A5.1. The Bidder certifies already having a valid and current [Agreement to Implement Employment Equity](#) (AIEE) in place with ESDC-Labour.

**OR**

- A5.2. The Bidder certifies having submitted the [Agreement to Implement Employment Equity \(LAB1168\)](#) to ESDC-Labour. As this is a condition to contract award, proceed to completing the form Agreement to Implement Employment Equity (LAB1168), duly signing it, and transmit it to ESDC-Labour.

Solicitation No. - N° de l'invitation  
W7714-196996/B SL  
Client Ref. No. - N° de réf. du client  
W7714-196996/B

Amd. No. - N° de la modif.  
File No. - N° du dossier  
017sl – W7714-196996/B

Buyer ID - Id de l'acheteur  
017sl  
CCC No./N° CCC - FMS No./N° VME

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B. Check only one of the following:

B1. The Bidder is not a Joint Venture.

**OR**

B2. The Bidder is a Joint venture and each member of the Joint Venture must provide the Contracting Authority with a completed annex Federal Contractors Program for Employment Equity - Certification. (Refer to the Joint Venture section of the Standard Instructions)

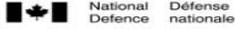
Solicitation No. - N° de l'invitation  
W7714-196996/B SL  
Client Ref. No. - N° de réf. du client  
W7714-196996/B

Amd. No. - N° de la modif.  
File No. - N° du dossier  
017sl – W7714-196996/B

Buyer ID - Id de l'acheteur  
017sl  
CCC No./N° CCC - FMS No./N° VME

**ANNEX "F"**

**DND 626, TASK AUTHORIZATION FORM**



**TASK AUTHORIZATION  
AUTORISATION DES TÂCHES**

<p>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.</p>		<p>Contract no. – N° du contrat</p>
		<p>Task no. – N° de la tâche</p>
<p>Amendment no. – N° de la modification</p>	<p>Increase/Decrease – Augmentation/Réduction</p>	<p>Previous value – Valeur précédente</p>
<p>To – À</p>	<p><b>TO THE CONTRACTOR</b>  You are requested to supply the following services in accordance with the terms of the above reference contract. Only 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><b>À L'ENTREPRENEUR</b>  Vous êtes prié de fournir les services suivants en conformité des termes du contrat mentionné ci-dessus. Seuls les services mentionnés dans le contrat doivent être fournis à l'appui de cette demande.  Prière 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>Delivery location – Expédié à</p>	<p>Date _____ for the Department of National Defence  pour le ministère de la Défense nationale</p>	
<p>Delivery/Completion date – Date de livraison/d'achèvement</p>		
<p>Contract item no.  N° d'article  du contrat</p>	<p>Services</p>	<p>Cost  Prix</p>
		<p><b>GST/HST  TPS/TVH</b></p>
		<p><b>Total</b></p>
<p><b>APPLICABLE ONLY TO PWGSC CONTRACTS:</b> The Contract Authority signature is required when the total value of the DND 626 exceeds the threshold specified in the contract.  <b>NE S'APPLIQUE QU'AUX CONTRATS DE TPSGC :</b> 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>_____ for the Department of Public Works and Government Services  pour le ministère des Travaux publics et services gouvernementaux</p>		

DND 626 (01-05)

Design: Forms Management 993-4050  
Conception : Gestion des formulaires 993-4052

Solicitation No. - N° de l'invitation  
W7714-196996/B SL  
Client Ref. No. - N° de réf. du client  
W7714-196996/B

Amd. No. - N° de la modif.  
File No. - N° du dossier  
017sl – W7714-196996/B

Buyer ID - Id de l'acheteur  
017sl  
CCC No./N° CCC - FMS No./N° VME

### 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.

**Note:**

Work on the task may not commence prior to the date this form is signed by the DA Authority - for tasks within the DND threshold; and by both DND and PWGSC for those tasks over the DND threshold.

### 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.

**Expédiez 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.

**Nota :**

Les travaux ne peuvent commencer avant la date de signature de ce formulaire par le responsable du MDN, pour les tâches dont le coût est inférieur au plafond établi par le MDN, et par le MDN et TPSGC pour les tâches dont le coût dépasse le plafond établi par le MDN.

Solicitation No. - N° de l'invitation  
W7714-196996/B SL  
Client Ref. No. - N° de réf. du client  
W7714-196996/B

Amd. No. - N° de la modif.  
File No. - N° du dossier  
017sl – W7714-196996/B

Buyer ID - Id de l'acheteur  
017sl  
CCC No./N° CCC - FMS No./N° VME

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**ANNEX G**

**NON-DISCLOSURE AGREEMENT**

I, \_\_\_\_\_, recognize that in the course of my work as an employee or subcontractor of \_\_\_\_\_, I may be given access to information by or on behalf of Canada in connection with the Work, pursuant to Contract Serial No: W7714-196996B/001/SL between Her Majesty the Queen in right of Canada, represented by the Minister of Public Works and Government Services and the Minister of National Defence, including any information that is confidential or proprietary to third parties, and information conceived, developed or produced by the Contractor as part of the Work. For the purposes of this agreement, information includes but not limited to: any documents, instructions, guidelines, data, material, advice or any other information whether received orally, in printed form, recorded electronically, or otherwise and whether or not labeled as proprietary or sensitive, that is disclosed to a person or that a person becomes aware of during the performance of the Contract.

I agree that I will not reproduce, copy, use, divulge, release or disclose, in whole or in part, in whatever way or form any information described above to any person other than a person employed by Canada on a need to know basis. I undertake to safeguard the same and take all necessary and appropriate measures, including those set out in any written or oral instructions issued by Canada, to prevent the disclosure of or access to such information in contravention of this agreement.

I also acknowledge that any information provided to the Contractor by or on behalf of Canada must be used solely for the purpose of the Contract and must remain the property of Canada or a third party, as the case may be.

I agree that the obligation of this agreement will survive the completion of the Contract Serial No: W7714-196996B/001/SL.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date