

Research Data Management Program – Competitive Funding Call 1

Statement of Work

Name of project:

Institution / Organization (Lead Contractor):

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# Instructions

Your Statement of Work (SOW) **must** follow the format and sequence outlined below. This requirement ensures consistency in proposal submissions and fair consideration for all applicants. Submissions that do not follow this format and sequence, or do not address the items specified may not be accepted for evaluation.

Instructions regarding the information that must be addressed in each section are presented in a grey text box under each heading.

Before uploading your Statement of Work:

* Delete this instruction page
* Update the Table of Contents
* Have Research Accounting / Research Services review the completed SOW and prepare the preliminary Budget.
* Upload your Statement of Work as a .pdf document in the Proposal Submission Form.
* Upload your preliminary Budget as an .xls document in the Proposal Submission Form.

# Project Summary

Using language and terms that someone without professional training in software development or data management can understand, please provide an executive overview of your proposed project. Should your proposal be accepted, this information will be used by CANARIE for communication and marketing purposes.  
  
You must address the following:

1. current functionality and features
2. specific research disciplines currently supported

*Max 750 words*

# Lead Contractor

|  |  |
| --- | --- |
| **Lead Contractor** | |
| Organization Name |  |
| Organization Type | <For-profit / Not-for-profit / University or College > |
| Anticipated role/s in the project |  |

|  |  |
| --- | --- |
| **Principal Investigator** | |
| Name |  |
| Title |  |
| Faculty/Department/Division/Program |  |
| Phone |  |
| Email |  |

Append a short bio (maximum one [1] page) summarizing relevant experience, expertise and qualifications.

|  |  |
| --- | --- |
| **Co-Principal Investigator** *(where applicable)* | |
| Name |  |
| Title |  |
| Faculty/Department/Division/Program |  |
| Phone |  |
| Email |  |

Append a short bio (maximum one [1] page) summarizing relevant experience, expertise and qualifications.

|  |  |
| --- | --- |
| **Project Manager**  CANARIE strongly recommends that your team include a dedicated Project Manager. | |
| Name |  |
| Title |  |
| Faculty/Department/Division/Program |  |
| Phone |  |
| Email |  |

Append a short bio (maximum one [1] page) summarizing relevant experience, expertise and qualifications.

|  |  |
| --- | --- |
| **Lead Software Developer**  If you do not currently have a Lead Software Developer, please leave this section blank. | |
| Name |  |
| Title |  |
| Faculty/Department/Division/Program |  |
| Phone |  |
| Email |  |

Append a short bio (maximum one [1] page) summarizing relevant experience, expertise and qualifications.

# Participants

**Note:**

* A Participant will incur eligible costs that will be claimed through the Lead Contractor.
* If you have multiple participants, please fill out the table below for each one.

|  |  |
| --- | --- |
| **Funded Participant #** | |
| Organization Name |  |
| Faculty/Department/Division/Program |  |
| Organization Type | <For-profit / Not-for-profit / University or College > |
| Address |  |
| Province |  |
| Anticipated role/s and rationale for involvement |  |

# Mandatory Criteria:

Please address each of the following mandatory criteria:

1. **How does the proposed software make use of Canadian digital infrastructure** (networking, compute, storage and/or sensors)**?**

**2. Explain how the proposed project contributes to one or more of CANARIE’s expected results:**

(a) enhance opportunities for collaborative knowledge creation and innovation within Canada’s research and education communities through the maintenance and development of the CANARIE Network and related tools and services;

(b) expand the research and education community’s access to and utilization of the CANARIE Network and the availability of tools and programming that increase the effectiveness of its use; and,

(c) enable the creation of innovative Information and Communications Technology (ICT) products and services and accelerate their commercialization in Canada.

**3. Please provide information to support that the software development proposed is technologically and economically viable in the timeframe of the project plan.**

**4. All funded work must be performed in Canada. Please identify the locations(s) at which the funded work would be performed.**

**5. The Lead Contractor must be a Canadian university, college, corporation or other legally recognized entity. Please provide the organization’s URL.**

**6. No more than half of the membership and Board of Directors of the Lead Contractor can be composed of representatives or agents of the federal government. Please provide a list of Board members or provide the list via the relevant URL.**

**7. In-Kind contributions must be at least 15% of total eligible project costs.** This is to be demonstrated in the Preliminary Budget.

**CONFIRMED**

**8. Software developed under CANARIE funding must be made available for other researchers to use at no cost, through the CANARIE Research Software Registry** **at:** [**https://science.canarie.ca/**](http://science.canarie.ca/researchmiddleware/services/list/main.html)  **for a period of 3 years from the end of the funding period.**

**CONFIRMED**

# Scoring Criteria:

Applicants must clearly answer each of the following questions:

1. **What is the extent to which the project makes use of or contributes to digital research infrastructure?**
2. **What is the extent to which the project creates or contributes to a national data service?**
3. **What is the extent to which the project supports FAIR principles?**
4. **What is the extent to which the project integrates with international digital research infrastructure?**

In addition to answering the questions above, applicants will also be scored on the following criteria:

1. **Completeness/quality/sustainability of the project/design.**
2. **Overall assessment of the project.**

# System Architecture

Insert a system architecture diagram outlining the hardware and software components of the proposed project, clearly differentiating between parts of the system that already exist and those parts that will have to be added/modified. Show how parts would interact with users and other resources, as appropriate.

Note: Your project should be designed with reuse and extendibility in mind.

*Max. 2 pages*

# Software Architecture

Insert a high-level architecture diagram of the major functional components of the proposed software, illustrating how they would interact with each other, and clearly differentiating between components that already exist and those that will have to be added or modified.

*Max. 2 pages*

# Software Development Summary

Please provide an overview of the proposed software development.

Your summary should:

1. Identify existing software that will be used.
2. Describe any modifications that will have to be made to the existing software.
3. Describe any new software that will have to be developed.

*Max 750 words*

# Future Customization and/or Extension of Functionality

Describe how your software design allows for future customization and/or extension of functionality.

*Max. 500 words*.

# Project Plan

**Methodology**

CANARIE allows both Agile (Scrum) and traditional Waterfall software development methodologies. Please indicate which development

methodology you plan to use.

If you plan to use a software development methodology other than Agile (Scrum) or Waterfall, please specify and provide a description of

the workflow.

In the table below, identify the key project tasks, timeline for completion, percentage of total project labour required, and the resulting Milestones or Deliverables.

In When developing your project plan, please take the following into consideration:

1. CANARIE will require technical progress updates every six (6) weeks, so please ensure that there are sufficient near, and long-term deliverables or progress metrics, from which progress can be assessed. A demonstration as well as a final report will be required at the end of the development period.
2. If you do not have a Project Manager or software team in place, you will need to include hiring as a key task in the project plan.
3. Software developed under CANARIE funding must be made available for other researchers to use at no cost, through the CANARIE Research Software Registry at: <https://science.canarie.ca/> for a period of 3 years from the end of the funded development period as noted in Mandatory Criteria (item 8). The technical requirements for adding software to science.canarie.ca can be found in [Research Service Support for the CANARIE Registry and Monitoring System](https://collaboration.canarie.ca/elgg/file/download/2728). **Please add two (2) weeks of development time to your project plan and budget to account for the implementation of such changes.**

**KEY TASKS LIST**

| **Key Task** | | **Start Date yyyy-mm-dd** | **End Date yyyy-mm-dd** | **% of total effort required for the project** | **Task Owner (Lead Contractor or Participant)** | **Milestones / Deliverables - must be tangible and measurable** |
| --- | --- | --- | --- | --- | --- | --- |
| **1** |  |  |  |  |  |  |
| **2** |  |  |  |  |  |  |
| **3** |  |  |  |  |  |  |
| **4** |  |  |  |  |  |  |
| **5** |  |  |  |  |  |  |
| **6** |  |  |  |  |  |  |
| **7** |  |  |  |  |  |  |
| **8** |  |  |  |  |  |  |
| **9** |  |  |  |  |  |  |
| **10** |  |  |  |  |  |  |

**FEATURES LIST**

In the table below, list the features of each deliverable identified above. Features should include all planned functionality. This feature list will be used by CANARIE to validate project progress and adherence to the Statement of Work. Your proposal may be rejected if the features for each deliverable are not sufficiently detailed.

| **Deliverable** | **Feature #** | **Feature Description** |
| --- | --- | --- |
| <First deliverable> | 1 |  |
|  | 2 |  |
|  | 3 |  |
| <Second deliverable> | 1 |  |
|  | 2 |  |
|  | 3 |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

# Risk Assessment and Mitigation Plan

Describe any risks (including non-HR risks) that could reasonably arise during development, and outline a mitigation strategy for each risk.

# Software Provenance

Please address the following questions:

* Who would authorize software releases?
* What validation procedures would be completed prior to release?
* What documents would be provided as part of the release package?
* How would you deal with upgrades / patches to third party software packages that you might use?

# Testing Plan

CANARIE strongly encourages the use of dedicated software testing resources. Outline how you intend to test your software to ensure it:

* meets the requirements that guided its design and development
* is usable and performs its intended function(s)
* can be installed and run in its intended environment

# User Training Plan

How do you intend to train / onboard new users?

# Maintenance and Support Plan

Outline your maintenance and support plan for the proposed software post CANARIE funding. Include your plans for:

* operations
* software maintenance
* providing user support
* extending / adding functionality
* facilitating adoption by new users

# Intellectual Property

How do you intend to manage any intellectual property arising from this proposed project?

Please note: Should commercialization of the IP take place, royalties will be required to accrue to CANARIE to repay some or all of the contribution, and a royalty agreement will be required.

# Appendix A – Bios

Append one [1] page bios for

* The Principal Investigator(s)
* The Project Manager
* The Lead Software Developer

# Appendix B – Letter(s) of Commitment

Append

* A letter of commitment from all partaking in the proposed project
* Any letters of support from other organizations/institutions