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| Informational Guidance |

**IG5315.204-5(b)  
Source Selection Documentation – Section L Guide**

### December 2008

This guide integrates ideas and lessons learned from a cross-section of the contracting community to provide practical guidance for preparing Section L Information to Offerors and Instructions for Proposal Preparation (or equivalent when not utilizing the uniform contract format) of the solicitation.

### Table of Contents

|  |  |
| --- | --- |
|  | **Page** |
| 1.0 Preface ……………………………………………………..…..…………….... | 4 |
| 1.1 [Use of](#p1_1) *[Hidden Text](#p1_1)* [in the Guide and Template](#p1_1) ………….……….……… | 4 |
| 1.2 [Why Use This Guide and Template?](#p1_2) …..…………………………..……..... | 4 |
| 1.3 [What This Guide and Template Will Answer](#p1_3) …………………..….………. | 5 |
| 1.4 [What is in This Guide And Template?](#p1_4) …………………………….………. | 5 |
| 1.5 [Acquisition Reform Initiatives](#p1_5)  ………………………………………………… | 6 |
| 1.6 [Keeping Current with Policy Changes](#p1_6)  ………………………...……………. | 6 |
| 2.0 Section L Guide – Description And Overview …..……………………......... | 7 |
| 2.1 [What to Include in Section L](#p2_1)  …………………………………………..……... | 7 |
| 2.2 [Format and Organization of Section L](#p2_2)  ..…………………………………….. | 7 |
| 2.3 [Content of Section L](#p2_3)  ………………………...………………….…..……….... | 7 |
| 2.4 [Section L Must](#p2_4)  ……………………………………………...………………..... | 8 |
| 2.5 [Section L Must Not](#p2_5)  ……………………………………………………..…...... | 8 |
| 1. [Section L Guide – L-III, Information to Offerors (ITO) and Instructions for](#p3_0)   [Proposal Preparation](#p3_0)  ………………….………………………..…………….. | 9 |
| 3.1 [Program Structure and Objectives](#p3_1)  .…….……..………………..….………... | 9 |
| 3.2 [Oral Presentations](#p3_2) ………..…………………………………….……………… | 9 |
| 3.3 [Communications](#p3_3) ...............…………………………………….……………… | 9 |
| 3.4 [Organization/Number of Copies/Page Limits](#p3_4)  ..…..………………………… | 9 |
| 3.5 [Page Limitations](#p3_5)  ……….………………………………..…………………….. | 10 |
| 3.6 [Page Size and Format](#p3_6) ………………………………….…………….………. | 10 |
| 3.7 [Cost or Pricing Information](#p3_7)  …………………………….………….…………. | 11 |
| 3.8 [Volume I – Executive Summary](#p3_8)  …….………………………………..……… | 11 |
| 3.9 [Volume II – Mission Capability](#p3_9)  …….………………………………....……… | 11 |
| 3.10 [Volume III – Past Performance](#p3_10)  ……..…………………………………..….. | 12 |
| 3.11 [Volume IV – Cost/Price](#p3_11)  …….……………………………...……...………… | 12 |
| 3.12 [Volume V – Contract Documentation](#p3_12)  …….……..……...………….……… | 13 |
| 3.13 [Attachment 1 – Cross-Reference Matrix](#p3_13)  ………..…………….…...……… | 14 |
| [4.0 Section L Template](#p4_0)  ………………………………………………….……..…. | 15 |
| Instructions, Conditions, and Notices to Offerors …………..…………..…... | 15 |
| L-I – Solicitation Provisions Incorporated by Reference …………………… | 15 |
| L-II – Solicitation Provisions in Full Text …………………………………….. | 16 |
| L-III – Information to Offerors (ITO) ……………………………….…………. | 18 |
| Program Structure and Objectives ……………………………...………... | 18 |
| Budget/Funding Information …………………………………………… | 18 |
| General Instructions ……………………………………………..…………. | 18 |
| General Information ………..…………………………………..………. | 18 |
| Point of Contact ……………………….………………….………… | 18 |
| Debriefings ……………………………….….…………….………… | 19 |
| Discrepancies ………………………….………………….………… | 19 |
| Electronic Reference Documents ……….……………….……….. | 19 |
| Oral Presentations …………………………………………..……... | 19 |
| Communications ………………………………………….………… | 20 |
| Organization/Number of Copies/Page Limits ……………….……….. | 20 |
| Page Limitations ……………………………………………..……... | 20 |
| Cost or Pricing Information ………………………………….…….. | 21 |
| Classified Information ………………………………………..…….. | 21 |
| Cross Referencing ………………………………………….………. | 21 |
| Indexing ……………………………………………………………… | 22 |
| Glossary of Abbreviations and Acronyms ……..………………… | 22 |
| Binding and Labeling …….……………………..………………….. | 22 |
| Electronic Offers ………………………………….….…………………. | 22 |
| Distribution ……………………………………………...……………….. | 22 |
| Volume I – Executive Summary ………………………….……………….. | 23 |
| Narrative Summary …………………………………………………….. | 23 |
| Table of Contents ………………………………………………………. | 23 |
| Volume II – Mission Capability ………... …………………………………. | 23 |
| General …………………………………………………..………………. | 23 |
| Format and Specific Content …...……………………...……………… | 23 |
| Mission Capability …………………………………..………….…… | 23 |
| Volume Organization ……………………………..………………… | 24 |
| Subfactor One, Two, etc. …………………………..….…………... | 24 |
| Volume III – Past Performance ……………………………………...……. | 24 |
| General ………………………………………………………..…………. | 24 |
| Early Proposal Information …………………………………………….. | 24 |
| Relevant Contracts ……………………………………………………... | 25 |
| Specific Content …………………………………………..………… | 25 |
| Organizational Structure Change History ………………..………. | 25 |
| Volume IV – Cost/Price …………..………………………………..………. | 26 |
| General Instructions ……………………………………………………. | 26 |
| Cost/Price Reasonableness and Realism ………..……………... | 26 |
| Estimating Techniques and Methods ………………..…………… | 26 |
| Cost/Price Information ……………………………….…………….. | 26 |
| Cost or Pricing Information Requirements …….…..…..………… | 26 |
| Rounding ………………………….………….……………………… | 27 |
| Volume Organization ……………………..……………….…………… | 27 |
| Estimating Methodology ……………………….………….…………… | 27 |
| Estimating System ……………………………………..…………… | 27 |
| Purchasing System ………………………………………….……… | 27 |
| Accounting System ……………………………………….………... | 28 |
| Explanation of Estimating Methods Used ………………..……… | 28 |
| Management Reduction …………………………………………… | 28 |
| Other Information ………………………………………………..……… | 29 |
| Commonality with Other Programs ……………………………….. | 29 |
| Funding Profile ……………………………………………..….……. | 29 |
| Cost Summary by Cost Elements ……………………….…..……. | 29 |
| Person – Loading Schedule and Basis of Estimate ….…………. | 30 |
| Schedule of Hours by Labor Skill Mix ……………………………. | 30 |
| Probable Subcontractors …………………………………………... | 30 |
| Major Material Items and Equipment ………………..…………… | 30 |
| Schedule of Rates …………………………….……………………. | 30 |
| Submission of Cost Models ……………………………………….. | 30 |
| Submission of Analysis of Uncertainty …………………………… | 31 |
| Volume V – Contract Documentation …………………………..………… | 31 |
| Model Contract/Representations and Certifications ………...……… | 31 |
| Section A – Solicitation/Contract Form …………………...……… | 31 |
| Section B – Supplies or Services and Costs/Prices ……..……... | 31 |
| Section F- Deliveries or Performance …….……………….……... | 31 |
| Section G – Contract Administrative Data ……………..………... | 32 |
| Section H – Special Contract Requirements ………………….…. | 32 |
| Section I – Contract Clauses ………………………………...……. | 32 |
| Section K – Representations, Certifications, and Other  Statements of Offerors …………………………………………….. | 32 |
| Exceptions to Solicitation Requirements …………………….………. | 32 |
| Other Information Required ………………………………….…..……. | 32 |
| Authorized Offeror Personnel ……………………………………... | 32 |
| Government Offices ………………………………………………... | 33 |
| Company/Division Address, Identifying Codes, and Applicable  Designations ………………………………………………………... | 33 |
| Attachments to the Model Contract ………………….……………….. | 33 |
| 5.0 Attachments |  |
| [Attachment 1 – Cross Reference Matrix](#atch1)  ………………………………...…… | 42 |
| [Attachment 2 – Past Performance Information](#atch2)  ……………………….…….. | 43 |
| [Attachment 3 – Past Performance Questionnaire](#atch3)  ………………………….. | 46 |
| Attachment 4 – Consent Letter …………………………………………………  Attachment 5 – Client Authorization Letter …………………………………… | 55  56 |

1.0 Preface

**1.1 Use of *Hidden Text* in the Guide and Template**

This guide and template was updated using Microsoft Office Word 2007. It is a **tool** to help you build your Section L[[1]](#footnote-1) – but cannot be used without careful editing. **You** must decide which parts apply to your particular situation, which ones should be deleted, and which ones must be tailored.

In addition to the separate guide itself, instructions and guidance are placed throughout the template as *hidden text* to help you decide which paragraphs to include and how to tailor them to your procurement. To see these instructions, the *hidden text* option must be used. To activate *hidden text*:

Click on the Microsoft Office Button (top left corner)

Click on “Word Options”

In the “Word Options” dialogue box, click “Display”

Under “Always show these formatting marks on the screen”, select the “Hidden Text” check box

Click “OK”

The document will print without the *hidden text* unless you select *hidden text* to be included in the “Printing Options”.

If you plan to post the completed document to a website/FedBizOpps for review, perhaps as part of a Draft solicitation/Request for Proposal (RFP), we recommend you make the *hidden text* unavailable. To do this, convert the document, with the *hidden text* deactivated, to a .pdf file before posting.

# 1.2 Why Use This Guide and Template?

This guide and template were written to help you write Air Force solicitations that better define and communicate to potential offerors how to develop and submit their proposals for formal best value source selections--those conducted in accordance with [AFFARS 5315.3](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/af_afmc/affars/5315.htm), Source Selection [[2]](#footnote-2). "Best value" encompasses a range of selection techniques that allow the Government to make an award decision based on those criteria deemed most important to assure the successful and affordable satisfaction of the mission requirement(s). Through this continuum, the relative importance of cost or price and other factors varies (See [FAR 15.101](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/15.htm)). This guide and template will help you to ensure your solicitation clearly directs offerors to supply the information your source selection team will need, in the format they need, to conduct their evaluation and award contracts to successful offerors. It will also help you to make sure you don't ask for information you don't need. This is critical, as extraneous information wastes both the offerors' and evaluators' time and resources.

Note: For acquisition requirements unique to the A-76 program, refer to [Air Force Instruction (AFI) 38-203, *Commercial Activities Program*](http://www.e-publishing.af.mil/shared/media/epubs/AFI38-203.pdf).

# 1.3 What This Guide and Template Will Answer

Specifically, this guide and template will help you prepare Section L, Instructions, conditions, and notices to offerors or respondents, for solicitations in support of competitive source selections. The hidden text throughout the template, along with the more detailed coverage of some topics in the guide, will help you answer such questions as:

* What goes in Section L?
* What information should you request?
* When should you specify format?
* When are page limitations appropriate?
* How does Section L track with Section M and other source selection and solicitation documents?

# 1.4 What is in This Guide and Template?

This practical “how-to” instructional reference tool is designed in a modular format, so you can concentrate on specific areas of key interest while skipping those that are familiar. A description and overview of Section L is presented in Section 1.0 of the guide to provide a general sense of its layout and contents. Section 2.0 provides more specific guidance for the Information to Offerors/Instructions for Proposal Preparation template that follows.

For most acquisition integrated product teams (IPTs), the most difficult part of writing Section L is ensuring you have requested all the information necessary to evaluate the resulting proposals against the criteria described in Section M and have not requested information that will not be evaluated. This is by far the most substantive and critical portion of the section. Along with the hidden text in the template, Section 2.0 offers help in this endeavor.

Another real challenge is making sure Section L tracks to and is consistent with other parts of the solicitation, especially Section M. Because of the interrelationship between Sections L and M, the two sections should be written together, using this guide and template and its accompanying Section M Guide and Template.

In addition to this guide and template and your source selection experts, your counterparts in industry can and will help you formulate strategies, define requirements, and draft documents. Requirements definition and acquisition strategy benefit from involving industry early in the process and providing access to documents related to the source selection to ensure there is as much communication as possible regarding the Government's needs.

# 1.5 Acquisition Reform Initiatives

Ongoing acquisition reform initiatives continue to affect our Air Force acquisitions. Some of these include:

* Greater use of commercial products and services (which may significantly affect what cost and pricing information you may request as well as impact your evaluation factors);
* More open communications with industry and early release of acquisition documents, such as draft solicitations, evaluation factors (which include the minimum performance or capability requirements against which they are judged); and
* Greater emphasis on risk assessment, both in the technical and cost areas, particularly for ACAT programs entering System Development and Demonstration (SDD).

# 1.6 Keeping Current with Policy Changes

As you prepare your Section L, ongoing policy changes may affect the procedures described in this guide, so please see your Acquisition Center of Excellence (ACE) or your Contracting Policy/Clearance office for additional information and assistance.

2.0 Section L Guide – Description and Overview

# 2.1 What to Include in Section L

Solicitation provisions and other information and instructions in Section L guide offerors in preparing their proposals. Instructions on how to format the proposal into severable parts, such as mission capability, past performance, and cost, are often included. Number of copies of paper and electronic versions of proposals to be submitted, page limitations, and similar information should be provided. Only minimum instructions necessary for proposal preparation should be included. Information to Offerors/Instructions for Proposal Preparation **MUST** be consistent with the award evaluation factors included in Section M. Upon award, both of these sections are removed and placed in the contract file; they do not become part of the contract.

# 2.2 Format and Organization of Section L

Your Section L will be comprised of two main parts. The first part will consist of solicitation provisions prescribed by the FAR, DFARS, AFFARS, and MAJCOM supplements, as appropriate, as well as any "administrative and one-time use provisions" crafted specifically to suit your acquisition situation. The organization and formatting of this part of Section L will be accomplished by the contract preparation software (ConWrite, ACPS, or SPS) used by your contracting office. The products resulting from these various automated tools differ somewhat in appearance; these differences are immaterial. The content of this part of Section L is dependent, not on the software application used to draft it, but on what you are buying and how you plan to contract for it. Your local Acquisition Center of Excellence or Contract Policy/Clearance office will help you determine what provisions are prescribed or recommended for your situation. Follow the instructions of your contract preparation application in developing the solicitation provisions portion of your Section L and use Subsection L-III of this template to develop your Information to Offerors and Instructions for Proposal Preparation. If you do not have a contract preparation software application, simply follow the format of the template, which is organized like the ConWrite program.

# 2.3 Content of Section L

Solicitation provisions incorporated by reference from the FAR, DFARS, AFFARS and MAJCOM Supplement, as appropriate, solicitation provisions produced in full text from these sources, administrative and one-time use provisions, and "Information to Offerors and Instructions for Proposal Preparation" are described below, according to the organization and format of this template:

- "SOLICITATION PROVISIONS INCORPORATED BY REFERENCE," (Section L-I of the template) may consist of the provisions established in the FAR and supplements thereto, when the prescription for that provision directs its placement in Section L, and incorporation by reference is authorized (See [FAR 52.102](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/52_000.htm) and [52.3](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/52_000.htm)).

- "SOLICITATION PROVISIONS IN FULL TEXT," (Section L-II of the template) may consist of provisions (or other special contract requirements or information) that are unique to the particular solicitation, not available electronically to offerors, or otherwise not authorized to be incorporated by reference (See [FAR 52.102](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/52_000.htm) and [52.3](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/52_000.htm)).

- "INFORMATION TO OFFERORS," (Section L-III of the template) consists of the information that specifically tells the offeror how to construct the proposal. Typically, Section L‑III will include instructions for preparing the proposal that will facilitate the Government's evaluation (i.e., proposal organization, page limitations and characteristics, presentation of cost information, etc.). Section L‑III should also include a Government prepared proposal matrix that cross‑references contract line item number (CLIN) requirements to the various sections of the solicitation (particularly Sections L and M). This cross reference must be consistent with the Work Breakdown Structure (WBS)/Statement of Work (SOW)/Statement of Objective (SOO)/Performance Work Statement (PWS)/CLIN/Contract Data Requirements List (CDRL) matrix required with the SOW in Section J. Normally, offerors will be instructed to add information to the matrix, so that they can demonstrate how their proposal fits with the initial matrix. If the matrix included in Section J addresses the relationship of solicitation sections (particularly L and M), it need not be repeated here.

# 2.4 Section L Must:

* Ensure proposal instructions are consistent with the evaluation factors/subfactors and **require only that which will be evaluated in accordance with Section M**.
* Ensure proposal instructions request cost or pricing information that will be evaluated for award or become part of the resulting contract. Ensure instructions request cost information only to the WBS level needed, if applicable, in a consistent, clear format. (See [FAR 15.305(a)(1)](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/15.htm) and [AFFARS MP5315.3](https://cs.eis.af.mil/airforcecontracting/knowledge_center/Pages/5315-main.aspx#MP), paragraph 5.5.3.)
* Ensure that any proposal page limitations imposed are adequate for the tasks to be explained.

# 2.5 Section L Must NOT:

* Require submission of plans and data with the proposal that are deliverable requirements of the resulting contract *unless* they are to be evaluated and are necessary for the Source Selection decision. Request outlines of intended approaches rather than detailed plans, if appropriate.
* Require offerors to submit items that are intended to be end items of the contract as part of the proposal. For example, do not require submission of a draft report as part of the proposal if the final report is an end item of the contract.

3.0 Section L Guide – Information to Offerors (ITO) and Instructions for Proposal Preparation

The following are instructions for specific paragraphs called out in the Section L template (4.0) that follows. Template paragraphs requiring no further explanation are omitted here for brevity; therefore, the paragraph numbering in parenthesis correlates to the numbering in the template.

# 3.1 Program Structure and Objectives

This section is optional but many programs have found this to be a convenient place to discuss overall program description, goals, funding (which is not the same as a Government estimate), etc. A half page to one and a half pages is usually sufficient. If your program involves a complex CLIN structure, a down-selection, or a large number of options or contract types, an introductory section on the program structure and objectives can be beneficial.

### 3.2 Oral Presentations

FAR 15.102 provides for the use of oral presentations to augment or substitute for portions of an offeror's proposal. Oral presentations can and have been used effectively to streamline the source selection process. However, you must be careful how such presentations are conducted, as they are subject to the same restrictions as written communications regarding content and timing. It is important to avoid prematurely or unintentionally entering discussions or inadvertently providing an offeror an opportunity to revise its proposal. Consideration should be given to declaring a competitive range and entering into discussions with offerors during the presentation of oral proposals. See [FAR 15.102](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/15.htm) and [IG5315.102](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/af_afmc/affars/IG5315.102.docx), Oral Presentations, and discuss with your Acquisition Center of Excellence or Contract Policy/Clearance office when and how this technique might be employed to your source selection team's advantage.

**3.3 Communications**

Describe the process and controls for communication between industry and Government personnel during the source selection. If the use of email is authorized, it should be encrypted. State how that encryption is established and how the email should be marked.

## 3.4. Organization/Number of Copies/Page Limits

(See Table 2.2 - Proposal Organization)

Excessively sized solicitations and proposals are costly to the offerors and unnecessarily time-consuming to evaluate. Strive to ensure the solicitation reflects only the essential requirements. This can be done by giving offerors clear and concise instructions for proposal preparation, tailoring statements of objectives, statements of work and specifications, eliminating unnecessary data requirements, and eliminating the request for and submission of data and information which is not germane to the selection and contract award process.

### 3.5 Page Limitations

Page limitations can be effective in focusing the offeror and evaluator on the key discriminators. The solicitation should state that the evaluators will read only up to the maximum number of pages specified. For paper copies, remove pages in excess of the maximum number from the back of the proposal and return them to the offeror as soon as practicable so that they are not evaluated. Consult your legal office/advisor prior to returning any removed pages.

**NOTE:** Since page and format limitations can be subject to abuse and arbitrary limitations, legal advice should be obtained concerning whether there is an unfair competitive advantage before rejecting a proposal for exceeding page or format limitations (for example, rejecting a proposal based on page count which includes the cover sheet and table of contents and where omitting these pages from the page count results in the proposal’s acceptability).

A 200-page limit is usually sufficient for the Mission Capability volume. However, you must set the limit based on the complexity of the acquisition and your Mission Capability subfactors.

Rather than an overall page limitation on the past performance volume, consider a page limit on each instance of performance experience reported (e.g. 1-2 page limit per citation, etc.). You may also wish to limit the number of instances of performance experience (citations) an offeror may report. Consider limiting the number of past performance citations rather than placing a page limit on the volume.

Place page limits on all other proposal volumes whenever possible and goals when page limits cannot be applied. The amount of information offerors are required to submit must be consistent with the page limits and goals established.

Also, limit the number of pages for responses to Evaluation Notices (ENs). The solicitation should state that limits will be set for responses to ENs. Such limits, which should be fair to all offerors, but may not be the same forall offerors, will preclude offerors submitting major proposal revisions under the guise of responding to ENs (because the appropriate limit will depend on the content of each EN). Identify reasonable page limits in the letter transmitting the ENs to the offeror. These limits, however, must not impact the requirement to conduct meaningful exchanges.

Spell out how past performance citations for IDIQ contracts are to be handled in terms of whether each delivery order must be considered as a separate citation or if the entire IDIQ contract, including all associated delivery orders as included. The former is recommended.

## 3.6 Page Size and Format

State page format restrictions in the proposal preparation instructions to allow for a common baseline for proposals and responses to ENs (for example, margins, type size, foldouts, photo reduction, and spacing). Consider commercial standards, if any. Provide Microsoft Office Excel formulas in any spreadsheets.

### 3.7 Cost or Pricing Information

Specify the type of cost or price based information the offeror is required to submit for evaluation of cost and/or price reasonableness and, when appropriate, cost realism.

Instruct offerors on form, format and other parameters of their cost or price based proposal submission. Some suggested instructions include:

* Type of electronic or magnetic medium
* Software program (for example, Microsoft Office Excel and Microsoft Office Access)
* Hardware compatibility; CD name, file name, and brief description
* Cross-reference to hard copy (volume and page number).

# 3.8 Volume I - Executive Summary

This section is optional but it helps evaluators understand the offeror's overall approach and rationale for selecting that approach. While the Mission Capability volume focuses on those aspects of the offeror's approach which relate to the Mission Capability subfactors, evaluators also need to grasp the "big picture" in order to render an accurate assessment. The wording used to request this information should focus on those areas of greatest interest to the program office[[3]](#footnote-3). For instance, if the offeror's proposed system architecture is of paramount importance, request the offeror describe its approach, supporting rationale, and if desired, other approaches considered and the reasons for rejection.

# 3.9 Volume II - Mission Capability

### 3.9.1 Sample Problem/Scenario

Some source selection teams find it useful to use a sample scenario or task to aid in the evaluation of a Mission Capability subfactor. In some cases a sample task or scenario may be particularly useful, such as where the problem-solving skills are themselves a critical discriminator (for example, contracts for engineering services or critical analysis). If appropriate, make the sample task the first known delivery order/task order.

**Suggestions**: Limit sample tasks/scenarios to address only the most critical aspects of the program. Tasks/scenarios that are too broad or complex may overwhelm the offerors in terms of the time and cost of producing an acceptable solution and thus, not provide the insight that was intended to be provided. Also, keep in mind, your evaluation team will have to read and evaluate each proposed solution. Sample tasks/scenarios need to be designed with a specific purpose in mind. They should be focused on obtaining only the information needed to satisfy the intended purpose. They must not be based on known or contemplated requirements, unless the sample task will become the first order under the contract. (For instance, if your requirement is for scientific or engineering services to solve specific problems then do not ask the offerors to solve those problems in their proposals. This would be seen as attempting to get the offerors to solve your problems at their expense rather than contracting for their services.) Be certain to limit redundancy between the sample task/scenario and other Mission Capability subfactors. If sample tasks/scenarios will be viewed as test questions, offerors should be advised that they will not be given the opportunity to improve on their answers during discussions.

**Note**: If you include a sample task/scenario, you must discuss in Section M how it will be evaluated and contribute to the rating of the applicable Mission Capability subfactor.

# 3.10 Volume III – Past Performance

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## 3.10.1 Relevant Contracts

It is strongly suggested that you ask the offerors to send your past performance questionnaire to the points of contact for completion concerning the various efforts they have identified as this will result in your obtaining past performance information earlier. If you elect to do this, be sure to provide clear instructions within the questionnaire directing the respondent to return (usually via fax) the completed form directly to the Contracting Officer (CO) or Performance Confidence Assessment Group (PCAG), **not the offeror.** It is a good idea to include return fax cover sheets (and pre-addressed return envelopes if using mail) in the solicitation for the offeror to send along with the questionnaire. A cover letter which briefly describes your acquisition and asks for the respondent's input, will likely result in more timely, thorough, and useful responses. If you are sending the questionnaires, the cover letter should be from the PCAG chair or CO. If the contractor is sending the questionnaires, you may want the cover letter to come from them, so they can provide a company point of contact in case they have provided the questionnaire to the wrong point of contact or address, or included incorrect, incomplete, or vague identifying information, such as, contract numbers, program identification, etc. Be sure the cover letter includes a Government point of contact (the CO) for questions about your acquisition or the questionnaire. You may want to provide the contractor with a sample transmittal letter. Although the questionnaire is requesting information from the respondent because a specific contract/effort has been identified as potentially relevant, consider asking the respondent to include information on any other contracts with the offeror that the respondent believes are relevant to your source selection. For all subcontractors proposed, request offerors identify which portion of the requirement they will be performing. This will be used to determine relevancy of subcontractor citations.

Attachment 3 to this guide has a sample past performance questionnaire that should be tailored to meet the needs of your specific requirement/acquisition.

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# 3.11 Volume IV – Cost/Price

## 3.11.1 Explanation of Required Cost Forms & Formats

### 3.11.2 General Methods, Tools and Cost Models

Section L should focus on what model must be completed and provided by offerors as part of the proposal considering any methods and/or tools identified in Section M that may be utilized when evaluating cost/price. Identify any Government-generated cost/price models provided for use by the offerors. The model should be tailored for use when information other than cost or pricing data is required to support cost and/or price reasonableness and/or cost realism. When cost models are being utilized, teams may need to discuss them with industry prior to RFP release.

**3.11.3 Most Probable Cost (MPC)**

When Section M identifies that the Cost/Price Factor will involve Government estimation of a MPC, Section L instructions must require offerors to provide both their proposed cost/price as well as their individual analysis of cost/price estimating uncertainty for ACAT I programs and other programs using MPC. RFPs should direct offerors to refer to or actually provide a copy of the Air Force Cost and Risk Uncertainty Handbook, located on the FM Knowledge Now Website at <https://afkm.wpafb.af.mil/afcruh>. Offerors will be instructed to provide both their proposed cost/price and their analysis of uncertainty as part of the cost/price proposal volume.

Note: ACAT SDD programs that use a Cost-Reimbursement or Fixed-Price Incentive type contract must perform a cost/price risk evaluation, which includes Government estimation of a MPC. The cost/price volume, Section L instructions should address the cost/price risk rating evaluation.

# 3.12 Volume V – Contract Documentation

## 3.12.1 Model Contract/Representations and Certifications

### 3.12.1.1 Section F - Deliveries or Performance

The Government may stipulate either a required or desired delivery schedule in the solicitation. Another approach is to require offerors to propose their delivery schedule in order to get a more realistic assessment of how long they really think the job will take. If a required delivery schedule is necessary, ensure that it is realistic and attainable. A required delivery schedule would appear in Section F of the solicitation. The Time of Delivery clause ([FAR 52.211-8](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/52_000.htm)) may be used if the Government wants to set forth a required delivery schedule and allow offerors to propose alternate delivery schedules. The Desired and Required Time of Delivery clause ([FAR 52.211‑9](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/52_000.htm)) may be used if the Government has a desired delivery date but requires delivery by a specified later date. For service contracts the basic period of performance plus each option period should be clearly identified in Section F. Normally, contractors are not asked to propose differing periods except possibly for the Transition/Phase-in Period.

### 3.12.1.2 Section K - Representations, Certifications, and other Statements of Offerors

Section K of the solicitation will typically include solicitation provisions that require representations, certifications, or the submission of other information by offerors upon submission of a proposal. The most common FAR provisions are covered by [FAR 52.204-8](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/52_000.htm), “Annual Representations and Certifications,” or [FAR 52.212-3](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/52_000.htm), “Offeror Representations and Certifications-Commercial Items,” and therefore are available in the On-Line Representations and Certifications Application (ORCA). However, ORCA does not include all FAR, DFARS, AFFARS, or MAJCOM supplement provisions, as appropriate. Therefore, these provisions still need to be included in Section K. The contracting officer is also still responsible for reviewing each offeror’s information in ORCA to ensure its compliance with the solicitation requirements. The ITO should provide clear instructions as to how the offeror should submit these representations and certifications, in which volume to include them, number of copies, whether to provide the original signed versions under separate cover, etc.

# 3.13 Attachment 1: Cross Reference Matrix

The purpose of the cross reference matrix is to show critical interrelationships and dependencies among the Work Breakdown Structure (WBS), Performance Work Statement (PWS), Statement of Objectives (SOO), Systems Requirements Document (SRD), Contract Line Item Number (CLIN), Contract Data Requirements List (CDRL) and Information to Offerors (ITO). The matrix ensures that all requirements are addressed, requirements do not conflict and solicitation sections are internally consistent. The Government team must fill in appropriate paragraph references for Government documents such as the SRD, SOO, PWS/SOW (if used), CDRLs, CLINs, contract clauses etc. The offerors then complete the matrix by filling in their proposal references.

4.0 Section L Template

*(Note: The paragraph/section numbering in this template is deliberate and should not be confused with the numbering of the Table of Contents of this guide.)*

SECTION L

Instructions, Conditions, and Notices to Offerors or Respondents

(REMINDER: See Page 4 for instructions on how to view the ***hidden text*** included throughout the template)

**IMPORTANT NOTE:** *The various contract preparation software applications used in the Air Force (ConWrite, ACPS, or SPS) produce contract instruments (including Section L) which differ somewhat in appearance. Although this Guide and Template was developed in Microsoft Office Word 2007, the organization of the template follows that of the Con-Write program. If you are using a contract preparation application, the software will organize and format the solicitation provisions portion of your Section L (Subsections L-I and L-II in this template). Simply skip to Subsection L-III of this template to develop your Information to Offerors. See Section L Guide (especially Sections 1.2 and 1.3) for details.*

L-I - Solicitation Provisions Incorporated by Reference

**NOTICE:** Pursuant to [FAR 52.252-1](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/52_246.htm), "SOLICITATION PROVISIONS INCORPORATED BY REFERENCE," the following provisions are incorporated herein by reference:

*(See your Acquisition Center of Excellence or Contracting Policy/Clearance office for current guidance on required/recommended provisions. The most common FAR provisions are covered by* [*FAR 52.204-8*](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/52_000.htm) *“Annual Representations and Certifications” and therefore available in the On-Line Representations and Certifications Application (ORCA). However, ORCA does not include all FAR provisions, nor any DFARS, AFFARS or MAJCOM supplement required provisions.)*

**A. FEDERAL ACQUISITION REGULATION (48 CFR CHAPTER 1) SOLICITATION PROVISIONS:**

|  |  |  |
| --- | --- | --- |
| PARAGRAPH | TITLE | DATE |
|  |  |  |
|  |  |  |
|  |  |  |

**B. DEPARTMENT OF DEFENSE FEDERAL ACQUISITION REGULATION SUPPLEMENT (48 CFR CHAPTER 2) SOLICITATION PROVISIONS:**

|  |  |  |
| --- | --- | --- |
| PARAGRAPH | TITLE | DATE |
|  |  |  |
|  |  |  |
|  |  |  |

**C. AIR FORCE FEDERAL ACQUISITION REGULATION SUPPLEMENT SOLICITATION PROVISIONS:**

|  |  |  |
| --- | --- | --- |
| PARAGRAPH | TITLE | DATE |
|  |  |  |
|  |  |  |
|  |  |  |

**D. MAJCOM FEDERAL ACQUISITION REGULATION SUPPLEMENT SOLICITATION PROVISIONS:**

|  |  |  |
| --- | --- | --- |
| PARAGRAPH | TITLE | DATE |
|  |  |  |
|  |  |  |
|  |  |  |

L-II - Solicitation Provisions in Full Text

**NOTICE:** The following provisions are hereby incorporated in full text:

*(See your Acquisition Center of Excellence or Contracting Policy/Clearance office for current guidance on required/recommended provisions.)*

**A. FEDERAL ACQUISITION REGULATION (48 CFR CHAPTER 1) SOLICITATION PROVISIONS:**

*(add applicable provisions in full text)*

**B. DEPARTMENT OF DEFENSE FEDERAL ACQUISITION REGULATION SUPPLEMENT (48 CFR CHAPTER 2) SOLICITATION PROVISIONS:**

*(add applicable provisions in full text)*

**C. AIR FORCE FEDERAL ACQUISITION REGULATION SUPPLEMENT SOLICITATION PROVISIONS:**

*(add applicable provisions in full text)*

**D. MAJCOM FEDERAL ACQUISITION REGULATION SUPPLEMENT SOLICITATION PROVISIONS:**

*(add applicable provisions in full text)*

**E. ADMINISTRATIVE AND ONE-TIME USE PROVISIONS:**

*(add applicable provisions in full text)*

(See your Acquisition Center of Excellence or Contracting Policy/Clearance office for approved administrative provisions and/or assistance in drafting provisions to suit your specific situation.)

L-III ‑ INFORMATION TO OFFERORS (ITO)

and INSTRUCTIONS FOR PROPOSAL PREPARATION

# 1.0 Program Structure and Objectives

*(See Section L Guide, paragraph 3.1 for specifics on this Paragraph.)*

## 1.1. Budget/Funding Information

*(When it is appropriate to include budget/funding information in the RFP)* For consideration in developing your proposal, the program/budget funding is as follows:

# 2.0 General Instructions

(a) This section of the ITO provides general guidance for preparing proposals as well as specific instructions on the format and content of the proposal. The offeror's proposal must include all data and information requested by the ITO and must be submitted in accordance with these instructions. The offer shall be compliant with the requirements as stated in the Statement of Work (SOW), Statement of Objectives (SOO), Performance Work Statement (PWS), System Specification, Contract Data Requirements List (CDRL), and Model Contract *(tailor as appropriate)*. **Non-conformance with the instructions provided in this ITO *may* result in an unfavorable proposal evaluation.**

(b) The proposal shall be clear, concise, and shall include sufficient detail for effective evaluation and for substantiating the validity of stated claims. The proposal should not simply rephrase or restate the Government's requirements but rather shall provide convincing rationale to address how the offeror intends to meet these requirements. Offerors shall assume that the Government has no prior knowledge of their facilities and experience and will base its evaluation on the information presented in the offeror's proposal.

(c) Elaborate brochures or documentation, binding, detailed art work, or other embellishments are unnecessary and are not desired. (*Include next sentence if using oral presentations.)* Similarly, for oral presentations, elaborate productions are unnecessary and not desired.

(d) The proposal acceptance period is specified in Section A of the model contract/solicitation. The offeror shall make a clear statement in Section A of the proposal documentation volume that the proposal is valid through this date.

(e) In accordance with [FAR Subpart 4.8](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/04.htm) (Government Contract Files), the Government will retain one copy of all unsuccessful proposals. Unless the offeror requests otherwise, the Government will destroy extra copies of such unsuccessful proposals.

## 2.1 General Information

### 2.1.1. Point of Contact

The Contracting Officer (CO) is the **sole** point of contact for this acquisition. Address any questions or concerns you may have to the CO. Written requests for clarification may be sent to the CO at the address located in Section A of the model contract/solicitation. *(If the CO will be using a source selection facility, consider inserting the address of that source selection facility here.)*

### 2.1.2. Debriefings

The CO will promptly notify offerors of any decision to exclude them from the competitive range; whereupon, they may request and receive a debriefing in accordance with [FAR 15.505](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/15.htm). Offerors excluded from the competitive range may request a pre-award debriefing or they may choose to wait until after the source selection decision to request a post-award debriefing. However, offerors excluded from the competitive range are entitled to no more than one debriefing for each proposal. The CO will notify unsuccessful offerors in the competitive range of the source selection decision in accordance with [FAR 15.506](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/15.htm). Upon such notification, unsuccessful offerors may request and receive a debriefing. Offerors desiring a debriefing must make their request in accordance with the requirements of FAR 15.505 or 15.506, as applicable.

### 2.1.3. Discrepancies

If an offeror believes that the requirements in these instructions contain an error, omission, or are otherwise unsound, the offeror shall immediately notify the CO in writing with supporting rationale as well as the remedies the offeror is asking the CO to consider as related to the omission or error. *(NOTE: Add the following sentence unless* [*FAR 52.215-1(f)*](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/52_215.htm) *Alternate I applies, i.e., unless you have indicated that you intend to have discussions.)* The offeror is reminded that the Government reserves the right to award this effort based on the initial proposal, as received, without discussion. This reservation includes matters of additional or substitute pages of the initial proposal.

### 2.1.4. Electronic Reference Documents

All referenced documents for this solicitation are available on the Federal Business Opportunities (FedBizOpps) web site at <http://www.fedbizopps.gov>. Potential offerors are encouraged to subscribe for real-time e-mail notifications when information has been posted to the website for this solicitation. The *(insert program name)* FedBizOpps web page is <http://www.fedbizopps.gov/>. *(If any necessary documents are not available on FedBizOpps, provide instructions on how potential offerors may obtain those documents (e.g., posted on FedTeds, or use of a Reading Room).)*

### 2.1.5. Oral Presentations

*(*[*FAR 15.102*](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/15.htm) *and your ACE can help you decide if oral presentations may be useful to your acquisition. If your program decides to use Oral Presentations, add the following:)*

Each offeror is requested to present the \_\_\_\_\_\_\_\_\_\_\_\_\_*(designate volumes or portions of volumes)* of its proposal in an oral presentation. *(State whether this presentation will augment the offeror’s written proposal for the designated subject matter or will constitute the offeror’s proposal in those areas (no written proposal coverage).)*

Presentations will begin at \_\_\_\_\_\_\_\_\_\_*(insert time and date)* at \_\_\_\_\_\_\_\_\_\_*(insert location)*.

Subsequent presentations will be at \_\_\_\_\_\_\_\_\_\_*(insert times)*.

The schedule will be repeated each weekday through \_\_\_\_\_\_\_\_*(insert date)* or until all presentations are completed.

No presentation may exceed \_\_\_\_\_\_\_\_\_\_*(insert time in terms of hours or minutes)* *or (insert number of charts permitted)* and each offeror may be represented by no more than \_\_\_\_\_*(insert number)* people.

*(If briefing charts are to be submitted, add:) (Designate number)* \_\_\_\_\_\_\_\_\_\_\_\_copies of all briefing materials presented must be submitted with the written proposal submission. However, these materials will not be considered in the Government's evaluation of your proposal. Only the presentation itself will be evaluated: In other words, any chart that is not briefed during the established time limit will not be evaluated.

The Government will notify offerors by phone, email, or FAX of the order of presentations by \_\_\_\_\_\_\_\_\_\_\_\_*(insert date)*.

By \_\_\_\_\_\_\_\_\_\_\_\_*(insert time and date-may be prior to proposal submittal)* the offeror must notify the Contracting Officer in writing of the name, phone, e-mail, and FAX number of the individual to whom the Government should give notice.

## 

**2.1.6 Communications**

*(See Section L Guide, paragraph 3.3 for specifics on this Paragraph.)*

Exchanges of source selection information between Government and offerors will be controlled by the Contracting Officer. Email may be used to transmit such information to offerors only if the email can be sent and received encrypted and includes “Source Selection Information – See [FAR 2.101](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/02.htm) & [3.104](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/03.htm)” in the Subject line. Otherwise, source selection information will be transmitted via \_\_\_\_\_\_\_\_\_. *(fill-in as appropriate, e.g. fax, U.S.P.S, FedEx, UPS, pick-up by local representative, etc.)*

## 2.2 Organization/Number of Copies/Page Limits

The offeror shall prepare the proposal as set forth in the Proposal Organization Table (Table 2.2 below). *This table must be tailored to reflect the proposal structure needed for your procurement.* The titles and contents of the volumes shall be as defined in this table, all of which shall be within the required page limits and with the number of copies as specified in Table 2.2. The attachments identified in the table shall be separately bound in three-ring, loose-leaf binders, as necessary *(tailor as needed)*. The contents of each proposal volume are described in the ITO paragraph as noted in the table below. *(This table is a sample. Include volumes and limits appropriate to your acquisition to include instructions on submittal of electronic versions of the proposal.)*

**Table 2.2 - Proposal Organization**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| VOLUME | ITO Paragraph  Number | VOLUME TITLE | COPIES \* | PAGE LIMIT |
| I | *(insert number)* | Executive Summary | *(insert number)* | *(insert number)* |
| II | *(insert number)* | Mission Capability | *(insert number)* | *(insert number)* |
| III | *(insert number)* | Relevant Past Performance | *(insert number)* | *(insert number) \*\** |
| IV | *(insert number)* | Cost/Price*\*\*\** | *(insert number)* | *(insert number)* |
| V | *(insert number)* | Contract Documentation | *(insert number)* | *(insert number)* |
| etc. | *(insert number)* | (Tailor to insert titles of all Volumes and Attachments ) | *(insert number)* | *(insert number)* |

*\* If electronic copies are solicited/accepted, specify the number of hard copies and the number of electronic copies. See paragraph 2.5 for further instructions on electronic copies.*

*\*\* Rather than a simple volume limit, consider limiting the number of past/present contracts submitted for the prime and each subcontractor, with a page limitation on each past contract submitted. Also consider excluding the "organizational structure change history" from any page limitation. See Section L Guide.)*

*\*\*\* For a firm fixed price proposal where no pricing information other than CLIN prices is solicited, the Cost/Price volume may be eliminated and the proposed CLIN prices included in the Contract Documentation volume.)*

### 2.2.1 Page Limitations

Page limitations shall be treated as maximums. If exceeded, the excess pages will not be read or considered in the evaluation of the proposal and excess paper copies will be returned to the offeror as soon as practicable. Page limitations may be placed on responses to Evaluation Notices (ENs). The specified page limits for EN responses will be identified in the letters forwarding the ENs to the offerors. Each page shall be counted except the following: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*(Cover pages, tables of contents, tabs, glossaries, resumes etc. Tailor as appropriate.)*

## 2.2.1.1. Page Size and Format

(**a**) A page is defined as each face of a sheet of paper containing information. When both sides of a sheet display printed material, it shall be counted as two pages. Page size shall be 8.5 x 11 inches, not including foldouts. Pages shall be \_\_\_\_\_\_\_\_\_\_\_\_*(select one: single spaced/double spaced/typed with 1.5 line spacing)*. Except for the reproduced sections of the solicitation document, the text size shall be no less than \_\_\_*(insert text size, i.e. 10, 12, etc.)* point. Tracking, kerning, and leading values shall not be changed from the default values of the word processing or page layout software. Use at least 1 inch margins on the top and bottom and ¾-inch side margins. Pages shall be numbered sequentially by volume. These page format restrictions shall apply to responses to ENs. *(If requesting/accepting proposals in electronic media, add: "These limitations shall apply to both electronic and hard copy proposals.")*

(**b**) Legible tables, charts, graphs and figures shall be used wherever practical to depict organizations, systems and layout, implementation schedules, plans, etc. These displays shall be uncomplicated, legible, and shall not exceed 11 by 17 inches in size. Foldout pages shall fold entirely within the volume, and \_\_\_\_\_\_\_\_\_\_\_*(select one: “count as a single page.” or “each 8.5 x 11 surface of a foldout shall be counted as a separate page.”)*. Foldout pages may only be used for large tables, charts, graphs, diagrams and schematics not for pages of text. For tables, charts, graphs and figures, the text shall be no smaller than \_\_\_\_\_\_\_\_\_ *(insert text size)* point. *(If requesting/accepting proposals in electronic media, add: "These limitations shall apply to both electronic and hard copy proposals.")*

### 2.2.2 Cost or Pricing Information

All cost or pricing information shall be addressed ONLY in the Cost/Price Proposal and Contract Documentation Volumes. Cost trade‑off information, work‑hour estimates, and material kinds and quantities may be used in other volumes only as appropriate for presenting rationale for alternatives or design and trade‑off decisions.

*(If the solicitation is for firm fixed price proposals and you are not soliciting cost/price information other than CLIN prices, consider the following language in lieu of 2.2.2 above:)*

*All pricing information shall be addressed in the Contract Documentation volume, in Section B of the Schedule of the RFP. Information shall be limited to Contract Line Item Number (CLIN), SubCLIN, or ELIN-level pricing, including unit and extended pricing, as specified in Section B of the RFP.*

(If your program will consider classified proposals, add the following:)

### 2.2.3 Classified Information

Where classified information is required in your response, it shall be provided as a classified supplement and bound in a single classified addendum to \_\_\_\_\_\_\_\_\_\_\_*(specify the proposal volume) .* Each entry in the classified addendum shall be referenced to the proposal volume, page number, and paragraph number to which it applies. Similarly, a reference shall be placed in the unclassified volume where the classified insert applies, giving the page and paragraph numbers within the addendum where it can be found. Binding shall conform to the same directions as those given in this ITO for unclassified portions. *(NOTE: Tailor the following sentence based on your specific security requirements)* The classified addendum shall be separately bound with an applicable security designation color cover, conforming to \_\_\_\_\_\_\_\_\_\_\_\_\_ (*specify applicable security regulations*), the [DD Form 254](http://www.dtic.mil/whs/directives/infomgt/forms/forminfo/forminfopage51.html), and the Security Classification Guide provided *(or referenced)* in this solicitation. Pages in a classified addendum will be included in the page count for the applicable volume. The classified addendum shall be submitted according to the applicable security regulations as follows \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*(specify procedure for submittal)*.

### 2.2.4 Cross-Referencing

To the greatest extent possible, each volume shall be written on a stand‑alone basis so that its contents may be evaluated with a minimum of cross referencing to other volumes of the proposal. Information required for proposal evaluation which is not found in its designated volume will be assumed to have been omitted from the proposal.

*(Insert one of the following:)*

Cross-referencing within a proposal volume is permitted where its use would conserve space without impairing clarity. *(or)*

Cross-referencing within a proposal volume is not permitted.

*(NOTE: If cross referencing within a volume is not allowed, the page limitation may need to be increased.)*

*Select one of the following:*

*(It is recommended that a matrix be provided. If you provide the matrix and require the offeror to fill it out, add:)*

The offeror shall fill out the cross reference matrix at Attachment \_\_\_\_\_\_\_*(insert attachment number)* of this ITO *(Attachment 1 of this template)* indicating the proposal reference information as it relates to the ITO, SOW/SOO/PWS, CLIN numbers, and CDRL references found therein.

*or:*

*(If you require the offeror to develop the matrix, add:)*

The offeror shall provide a cross-reference matrix indicating by ITO, SOW/SOO/PWS, and/or specification paragraph number, the corresponding proposal paragraph in that section which addresses the referenced item.

### 2.2.5 Indexing

Each volume shall contain a more detailed table of contents to delineate the subparagraphs within that volume. Tab indexing shall be used to identify sections.

*(If glossaries are desired, add the following:)*

### 2.2.6 Glossary of Abbreviations and Acronyms

Each volume shall contain a glossary of all abbreviations and acronyms used, and with an explanation for each. Glossaries do not count against the page limitations for their respective volumes.

## 2.2.7 Binding and Labeling

*(Tailor as needed)*

Each volume of the proposal should be separately bound in a three-ring, loose leaf binder permitting the volume to lie flat when open. Staples shall not be used. A cover sheet should be bound in each book, clearly marked as to volume number, title, copy number, solicitation identification, and the offeror's name. The same identifying data should be placed on the spine of each binder. All unclassified document binders shall have a color other than red or other applicable security designation colors. Be sure to apply all appropriate markings including those prescribed in accordance with [FAR 52.215-1(e)](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/52_215.htm), Restriction on Disclosure and Use of Data, and [FAR 3.104-4](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/03.htm), Disclosure, Protection, and Marking of Contractor Bid or Proposal Information and Source Selection Information.

## 2.3 Electronic Offers

*(If electronic offers are to be solicited/accepted, tailor and insert, substantially as follows:)*

The content and page size of electronic copies must be identical to the hard copies. For electronic copies, indicate on each CD the volume number and title. Use separate files to permit rapid location of all portions, including subfactors, exhibits, annexes, and attachments, if any. The offeror shall submit volumes \_\_\_\_*(insert volume number)* through \_\_\_\_*(insert volume number)* in electronic format, using recordable CDs. Each volume shall be in a different directory on a CD. If files are compressed, the necessary decompression program must be included. The electronic copies of the proposal shall be submitted in a format readable by Microsoft (MS) Office Word 2007, MS Office Excel 2007, MS Office Project 2007, and MS Office Power Point 2007, as applicable. In the event that hard copies and electronic copies of a proposal are submitted and if there are any discrepancies between the hard copies and the electronic copies of the proposal, the hard copies will be used for evaluation.

*(Tailor to match your office software. If using EZSource, tailor paragraph to address electronic submittal instructions. NOTE: If utilizing a source selection facility to conduct your source selection, obtain/ensure availability of software prior to issuing RFP)*

## 2.4 Distribution

The "original" proposal shall be identified. Proposals shall be addressed to the Contracting Officer and mailed or hand carried to: \_\_\_\_\_\_\_\_\_\_\_\_\_\_ *(insert complete address, including office symbol, solicitation number, street, building, base and zip code). (If you plan to request DCMA and/or DCAA support in evaluating proposals (e.g., cost information for other than FFP proposals), include additional distribution instructions for ACO, DCAA, etc. as appropriate. If you ask the offeror to send proposals to the ACO and DCAA, you may add:)*

Be sure to advise the Administrative Contracting Officer (ACO) and the Defense Contract Audit Agency (DCAA) for prime and subcontractors that the proposal is "For Official Use Only" and "Source Selection Information--See [FAR 2.101](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/02.htm) and [FAR 3.104](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/03.htm)".

# 3.0 Volume I ‑ Executive Summary

*(See Section L Guide paragraph 3.8 for further information on this volume:)*

In the executive summary volume, the offeror shall provide the following information:

## 3.1 Narrative Summary

The narrative summary of the entire proposal should be concise, to include addressing the significant risks, and highlighting any key or unique features, excluding cost/price. The salient features should tie in with Section M evaluation factors/subfactors. Any summary material presented here shall not be considered as meeting the requirements for any portions of other volumes of the proposal.

## 3.2 Table of Contents

Include a master table of contents of the entire proposal. *(This allows evaluators to readily locate proposal material that may be germane to their particular evaluation portion but is not included in the proposal volume with which they are primarily involved.)*

# 4.0 Volume II - Mission Capability Volume

## 4.1 General

The Mission Capability Volume should be specific and complete. Legibility, clarity, and coherence are very important. Your responses will be evaluated against the Mission Capability subfactors defined in Section M, Evaluation Factors for Award. Using the instructions provided below, provide as specifically as possible the actual methodology you would use for accomplishing/satisfying these subfactors. All the requirements specified in the solicitation are mandatory. By your proposal submission, you are representing that your firm will perform all the requirements specified in the solicitation. It is not necessary or desirable for you to tell us so in your proposal. Do not merely reiterate the objectives or reformulate the requirements specified in the solicitation.

## 4.2 Format and Specific Content

*(Each ITO will have a unique configuration for this part of the instructions, based on the technical aspects of your program. The description of the Mission Capability subfactors, including how each will be evaluated, should be in Section M. In Section L, however, you must instruct the offerors concerning how you want them to construct and present their responses. Structure this section according to your Section M, Evaluation Factors for Award. Include a sub-bullet for each subfactor and include formatting instructions and content requirements for all information the offeror will be required to provide for the evaluation of that subfactor. For instance, if section M identified the first subfactor under the Mission Capability factor to be Reliability and described a subfactor evaluation considering the offeror's proposed approach to Predictions and Analysis as well as their approach to Environmental Stress Screening, the requested formatting might appear in the ITO as follows:)*

*Volume II Mission Capability*

*Subfactor 1 Reliability*

*Predictions and Analysis*

*Environmental Stress Screening*

### 4.2.1 Mission Capability

In the Mission Capability volume, address your proposed approach to meeting or exceeding the minimum performance or capability requirements of each Mission Capability subfactor, as well as the risks in your proposed approach in terms of mission capability/performance, cost, and/or schedule.

### 4.2.1.1 Mission Capability Risk

Address Mission Capability Risk by identifying those aspects of the proposal you consider to have the potential for disruption of schedule, increased cost, poor performance, the need for increased Government oversight, and/or the likelihood of unsuccessful contract performance. Classify each risk in accordance with [AFFARS MP5315.3](https://cs.eis.af.mil/airforcecontracting/knowledge_center/Pages/5315-main.aspx#MP), Table 2 – Mission Capability Risk Ratings. Provide the rationale for each risk and its rating, including quantitative estimates of the impact on cost, schedule, and performance.Describe the impact of each identified risk in terms of its potential to interfere with or prevent the successful accomplishment of other contract requirements (for example: SOW or specification requirements), whether or not those requirements are identified as subfactors. Propose a realistic "work‑around" or risk mitigators for identified risks that will eliminate or reduce risk to an acceptable level. Identify and classify any new risks introduced by such risk mitigation.

### 4.2.2 Volume Organization

The Mission Capability volume shall be organized according to the following general outline: *(This must be tailored)*

1. Table of Contents
2. List of Table and Drawings
3. Glossary
4. Cross Reference Matrix
5. Subfactor One
6. Subfactor Two (etc.)
7. Risk Matrix

### 4.2.3 Subfactor One, Two, etc.:

*(Reference DFARS 215.304(c)(ii). If this is a Major Defense Acquisition Program, as defined in 10 U.S.C. 2430, and the purchase and use of capital assets manufactured in the U.S. is pertinent to the best value determination, include language substantially as follows, under one of the subfactors: “Submit a list of capital assets manufactured in the United States that will be purchased and/or used on this program. Include for each capital asset a brief description, date of purchase, or planned purchase, purchase price, manufacturer’s name and address, and location of asset manufacture.”)*

*(For all ACAT source selections and all other source selections where systems engineering effort is required include Systems Engineering effort as a subfactor. Tailor paragraph accordingly. If the ACAT acquisition has no Systems Engineering effort, the SSA, with Program Executive Office approval, shall document the contract file accordingly; and a systems engineering subfactor is not required. Specific guidance on how to tailor the evaluation criteria on Systems Engineering can be found at the Air Force* [*Center for Systems Engineering*](http://www.afit.edu/cse/)*, in their “Reference Library” under “DoD Policies and Guidance.” Look for the* [*Guide for Integrating Systems Engineering into DoD Acquisitions and Contracts*](http://www.afit.edu/cse/docs/Integrating-SE-Acquisition-Contracts_guide_121106.pdf)*.)*

# 5.0 Volume III - Past Performance

*(NOTE: A Sample questionnaire/assessment format and sample consent and client authorization letters are included at Attachments 3, 4 and 5 to this template.)*

## 5.1 General

Each offeror shall submit a past performance volume with its proposal, containing past performance information in accordance with the format contained in Attachment \_ *(Attachment 2 to this template)*. This information is required on the offeror and all subcontractors, teaming partners, and/or joint venture partners who are proposed to perform \_\_ percent or more of the proposed effort based on the total proposed price *(or cost, as applicable)* or perform aspects of the effort the offeror considers critical to overall successful performance. Offerors are cautioned that the Government will use data provided by each offeror in this volume and data obtained from other sources in the evaluation of past performance.

Along with the information required in this paragraph, the offeror shall submit a consent letter executed by each subcontractor, teaming partner, and/or joint venture partner, authorizing release of adverse past performance information to the offeror so the offeror can respond to such information. For each identified effort for a commercial customer, the offeror shall also submit a client authorization letter, authorizing release to the Government of requested information on the offeror's performance.

## 5.2 Early Proposal Information

(OPTIONAL--To permit the Performance Confidence Assessment Group (PCAG) to conduct its assessment more efficiently, you may wish to request or require that offerors submit their past performance volume before the required submission date for the rest of the proposal. It is suggested that you ask the offerors to send your questionnaire directly to the points of contact for the past efforts they identify to you, provided the instructions to the respondents clearly instruct that all responses are to be provided directly to the Government contracting officer).

Each offeror is requested to submit the information shown in Attachment  *(Attachment 2 to this template)* for each relevant contract \_\_*(insert number)* days prior to the date set for receipt of proposals. Failure to submit early proposal information will/will not result in offeror disqualification. *(The team needs to decide whether late submittal of the past performance volume will or will not result in offeror disqualification. If it will result in disqualification, clearly state in any cover letter that submission of the past performance volume will be subject to the late proposal rule. See Zebra Technologies International, LLC, B-296158, Jun 24, 2005.)*

## 5.3 Relevant Contracts

(For detailed explanation, see Section L Guide)

Submit information in accordance with Attachment  *(Attachment 2 to this template)*: Past Performance Information on \_\_\_ *(insert desired number)* recent contracts that you consider most relevant in demonstrating your ability to perform the proposed effort. *(insert what is considered “recent”, such as ongoing contracts or those completed within three years of the date of issuance of the solicitation)* Also include information on \_\_\_ *(insert desired number)* recent contracts performed by each of your teaming partners and significant subcontractors that you consider most relevant in demonstrating their ability to perform the proposed effort. Include rationale supporting your assertion of relevance. For a description of the characteristics or aspects the Government will consider in determining recency and relevance, see Section M, provision M002 - Evaluation Factors, paragraph M002d - Past Performance Factor.

### 5.3.1 Specific Content

Offerors are required to explain what aspects of the contracts are deemed relevant to the proposed effort and to what aspects of the proposed effort they relate. This may include a discussion of efforts accomplished by the offeror to resolve problems encountered on prior contracts as well as past efforts to identify and manage program risk. Merely having problems does not automatically equate to a limited or no confidence rating, since the problems encountered may have been on a more complex program, or an offeror may have subsequently demonstrated the ability to overcome the problems encountered. The offeror is required to clearly demonstrate management actions employed in overcoming problems and the effects of those actions in terms of improvements achieved or problems rectified. This may allow the offeror to be considered a higher confidence candidate. For example, submittal of quality performance indicators or other management indicators that clearly support that an offeror has overcome past problems is required. Categorize the relevant information into the specific Mission Capability subfactors *(if used)* and Cost/Price factor used to evaluate the proposal.

### 5.3.2 Organizational Structure Change History

Many companies have acquired, been acquired by, or otherwise merged with other companies, and/or reorganized their divisions, business groups, subsidiary companies, etc. In many cases, these changes have taken place during the time of performance of relevant past efforts or between conclusion of recent past efforts and this source selection. As a result, it is sometimes difficult to determine what past performance is relevant to this acquisition. To facilitate this relevancy determination, include in this proposal volume a "roadmap" describing all such changes in the organization of your company. A pamphlet or other commercial document describing such reorganizations may suffice. As part of this explanation, show how these changes impact the relevance of any efforts you identify for past performance evaluation/performance confidence assessment. Since the Government intends to consider past performance information provided by other sources as well as that provided by the offeror(s), your "roadmap" should be both specifically applicable to the efforts you identify and general enough to apply to efforts on which the Government receives information from other sources.

# 6.0 Volume IV - Cost/Price

*NOTE: Significant tailoring of this portion of the template is required to ensure you request only the minimum amount of information in support of proposed costs or prices necessary to perform the price/cost reasonableness and cost realism evaluation you describe in Section M. Much of what follows may not be applicable to your acquisition, depending on the nature of the goods or services acquired, the type of contract(s) contemplated, and the expectation of competition. For firm fixed price acquisitions, approval to obtain information other than cost or pricing data from offerors shall be obtained from the DAS(C) - see* [*AFFARS 5315.402*](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/af_afmc/affars/5315.htm)*.*

## 6.1 General Instructions

### 6.1.1 Cost/Price Reasonableness and Realism

This section is to assist you in submitting information other than cost or pricing data that is required to evaluate the reasonableness *(and, if applicable, realism, balance, and/or affordability)* of your proposed cost/price. Compliance with these requirements is mandatory and failure to comply may result in rejection of your proposal. Note that unrealistically low or high proposed costs or prices, initially or subsequently, may be grounds for eliminating a proposal from competition either on the basis that the offeror does not understand the requirement or has submitted an unrealistic proposal. Additionally, unbalanced pricing poses an unacceptable risk to the Government and may be a reason to reject an offeror’s proposal. Offers should be sufficiently detailed to demonstrate their reasonableness *(and, if applicable, realism, balance, and/or affordability)*. The burden of proof for credibility of proposed costs/prices rests with the offeror.

### 6.1.2 Estimating Techniques and Methods

When responding to the Cost/Price Volume requirements in the solicitation, the offeror and associated subcontractors may use any generally accepted estimating technique, including contemporary estimating methods (such as Cost-to-Cost and Cost-to-Non-Cost Estimating Relationships (CERs), commercially available parametric cost models, in-house developed parametric cost models, etc.), to develop their estimates. If necessary, reasonable and supportable allocation techniques may be used to spread hours and/or costs to lower levels of the work breakdown structure (WBS).

### 6.1.3 Cost/Price Information

Information beyond that required by this instruction shall not be submitted, unless you consider it essential to document or support your cost/price position. All information relating to the proposed price, including all required supporting documentation, must be included in the section of the proposal designated as the Cost/Price volume. **Under no circumstances shall this information and documentation be included elsewhere in the proposal**.

### 6.1.4 Cost or Pricing Information Requirements

*IAW* [*FAR 15.403-5(b)(1),(2), and (3)*](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/15.htm)*, the offeror's format for submitting such information should be used unless the contracting officer decides that use of a specific format is essential and the format has been described in the solicitation.*

In accordance with [FAR 15.403-1(b)](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/15.htm) and [15.403-3(a)](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/15.htm), information other than cost or pricing data may be required to support price *(or cost, as applicable)* reasonableness *(and, if applicable, cost realism)*. Information shall be provided in accordance with [FAR 15.403-5](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/15.htm) *(except where tailored formats are specified hereunder--see paragraph 6.4.2 below)*. If, after receipt of proposals, the CO determines that there is insufficient information available to determine price reasonableness and none of the exceptions in [FAR 15.403-1](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/15.htm) apply, the offeror shall be required to submit cost or pricing data.

### 6.1.5 Rounding

All dollar amounts provided shall be rounded to the nearest dollar. All loaded labor rates shall be rounded to the nearest penny.

## 6.2 Volume Organization

The Cost/Price volume shall consist of the following sections:

(Tailor to include only the information you are asking for.)

SECTION 1 ‑ Table of Contents; summary descriptions of estimating, purchasing, and accounting systems; changes to estimating, accounting practices, or Cost Accounting Standards (CAS) Disclosure Statement.

SECTION 2 ‑ Cost or pricing information and supporting data, to include estimating methodology.

SECTION 3 ‑ Other information such as Government Furnished Property/Government Furnished Equipment (GFP/GFE), base support, long lead costs, termination costs, development/production schedule, inflation rate summary and explanation, life cycle cost, and special tooling/test equipment. List each exception to the ground rules and assumptions provided in the solicitation and each qualification of the Cost/Price volume, if any. Provide complete rationale for any exceptions.

(Use the following paragraphs as a guide for specifying which cost elements require offeror supplied information for purposes of determining price reasonableness or performing a cost realism analysis. Tailor the sections 6.3 and 6.4 to address any specific cost elements necessary to accomplish that objective.)

## 6.3 Estimating Methodology

*(Significant tailoring may be required to be consistent with the level of cost information you request. Remember to ask for the minimum amount of cost information and don't ask for any information you don't plan to evaluate. Normally none of this information will be requested if a firm fixed price contract is contemplated.)*

### 6.3.1 Estimating System

Provide a summary description of your standard estimating system or methods. The summary description shall cover separately each major cost element (e.g., Direct Material, Engineering Labor, Manufacturing Labor, Indirect Costs, Other Direct Costs, Overhead, G&A, etc.). Also, identify any deviations from your standard estimating procedures in preparing this proposal volume. Indicate whether you have Government approval of your system and if so, provide evidence of such approval.

### 6.3.2 Purchasing System

Provide a summary description of your purchasing system or methods (e.g., how material requirements are determined, how sources are selected, when firm quotes are obtained, what provision is made to ensure quantity and other discounts). Also, identify any deviations from your standard procedures in preparing this proposal. Indicate whether you have Government approval of your system and if so, provide evidence of such approval.

### 6.3.3 Accounting System

Indicate whether you have Government approval of your accounting system and if so, provide evidence of such approval. Also, identify any deviations from your standard procedures in preparing this proposal.

### 6.3.4 Explanation of Estimating Methods Used

Explain the methodology used to estimate each cost element. As a minimum, provide the following information for each cost element. If a portion of the required information is not applicable for a particular cost element, so state.

**6.3.4.1 Past Experience-Based Estimates**

Where cost estimates are based upon past experience, identify the past experience, explain how the past experience relates to the current effort, including similarities and differences, and how cost data available from the past experiences was adapted to the current effort.

**6.3.4.2 Learning Curve Estimates**

Where cost estimates are based upon learning/improvement curve applications, identify the specific area subject to learning, the curve hypothesis (unit or cumulative) and the slope of the curve as a percent. Also, identify the data used to develop the first unit cost and slope and explain how this data related to the current effort and how entry on the learning curve was attained (i.e., how the first unit cost was derived).

**6.3.4.3 Engineering Labor Hours**

If engineering labor hours have been estimated based upon other than past experience, provide detailed rationale on how they have been estimated.

**6.3.4.4 Engineering Labor Hour Skill Mix**

Explain how the proposed engineering labor hour skill mix has been derived and how the skill mix on this proposal compares with the overall plant skill mix. Explain why the cost element requires an average, higher, or lower than average skill mix, as applicable. If your normal estimating system uses a plant‑wide average for proposal purposes, so state.

**6.3.4.5 Manufacturing Labor Hours**

If manufacturing labor hours have been estimated based upon other than past experience and/or learning curve application, provide detailed rationale on how they have been estimated. If standards were used, identify and explain how they were derived and state whether or not they have been used on other programs. If other than normal procedures were used to estimate manufacturing hours, explain.

### 6.3.5 Management Reduction

If estimated costs to perform the proposed effort have been decreased due to a management decision, provide a summary of the reduction by major cost element summary. Also provide complete rationale for the reduction.

## 6.4 Other Information

*(Significant tailoring may be required to be consistent with the level of cost information you request. Remember to ask for the minimum amount of cost information and don't ask for any information you don't plan to evaluate.)*

### 6.4.1 Commonality with Other Programs

Any cost reductions made in your proposal that are attributed to commonality with other programs, company‑funded efforts, or capitalization of equipment must be supported with the following:

|  |  |
| --- | --- |
| (a) Commonality | ‑ Identify the specific program(s) and why it is applicable.  ‑ Address the cost allowability and allocability of this action per FAR and your CAS Disclosure Statement. |
| (b) Company-Funded  Efforts | - Identify the specific efforts, the planned start and end dates, the applicability to the current solicitation, the source of company funding and how you plan to account for or allocate these costs in accordance with generally accepted accounting principles, and your CAS Disclosure Statement, if applicable. |
| (c) Capital Equipment | - Identify the specific item(s) capitalized and what other applications exist for the equipment, provide corporate approvals for each action, address the cost allowability and allocability of the action per the FAR and your CAS Disclosure Statement. |

### 6.4.2 Funding Profile

*(NOTE: Tailor the following, based on whether you will need a funding profile and the level of segregation required. For example, for contracts involving activities properly funded by different appropriations, ensure the level of detail is sufficient to differentiate among the types of required funds and the timing of expected funding requirements. This information is normally used in incrementally funded contracts.)*

Submit then-year funding requirements by type of funds, by Government fiscal year, supported by monthly/quarterly projections of expenditures, commitments, and termination expense. Note that the funding schedules must be consistent with any imposed Government budgetary constraints.

### 6.4.3 Cost Summary by Cost Elements

Provide a cost summary by major cost elements by CLIN using the format shown below (and separately identify costs for Other Direct Costs including travel costs):

*(The following example format should be tailored to reflect the applicable elements and level of detail.)*

**Table 6.4.3 - Cost Summary by Cost Elements**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **COST ELEMENT** | **0001** | **0002** | **etc** | **TOTAL** |
| **Prime Hours** |  |  |  |  |
| **Inter-divisional hours** |  |  |  |  |
| **Subcontractor hours** |  |  |  |  |
| **Total Hours** |  |  |  |  |
| **Direct Labor ($)** |  |  |  |  |
| **Overhead ($)** |  |  |  |  |
| **Material ($)** |  |  |  |  |
| **Subcontracts ($)** |  |  |  |  |
| **Interdivisional ($)** |  |  |  |  |
| **Other Direct Costs ($)** |  |  |  |  |
| **Subtotal ($)** |  |  |  |  |
| **G&A ($)** |  |  |  |  |
| **Estimated Cost ($)** |  |  |  |  |
| **Facility Capital Cost of Money ($)** |  |  |  |  |
| **Profit/Fee ($)** |  |  |  |  |
| **Total Price ($)** |  |  |  |  |

### 6.4.4 Person-Loading Schedule and Basis of Estimate

As a separate attachment to the Cost/Price volume, submit a person-loading schedule that is a summary of the total proposed hourly requirements by third level *(insert level required to perform cost realism analysis)* WBS. These hourly requirements are to include (but separately identify) subcontractor(s) and inter-divisional transfer(s) hours. All hours shown in this attachment must agree with those reflected in the cost summary in Table 5.4.3 above. Also include the basis of estimate sheets supporting the proposed hours, material, and other direct costs in this attachment.

*(This is requested as a separate attachment so that it can be provided to the technical team for cost realism and technical evaluation purposes.)*

### 6.4.5 Schedule of Hours by Labor Skill Mix

Submit a schedule showing total proposed hours summarized by labor skill mix. This schedule is to include (but separately identify) subcontractor(s) and inter-divisional transfer(s) hours. In addition, provide labor classification statements for each category of labor proposed (prime, subcontracts, and inter-divisional) describing position qualifications (education, years of experience, etc).

### 6.4.6 Probable Subcontractors

Submit a list of the proposed probable subcontractors and inter-divisional transfers showing (a) the supplier, (b) description of effort, (c) type of contract, (d) price and hours proposed by each, (e) price and hours included in prime’s proposal to the Government, and (f) commercial item/service determination support, if applicable.

### 6.4.7 Major Material Items and Equipment

Submit a list of each major material item and applicable equipment with an extended value exceeding \_\_\_\_\_\_\_\_\_\_*(insert amount)* showing nomenclature, part number, quantity required, unit price and extended price, (i.e. basis of estimate such as vendor quotes, purchase orders, engineering estimates, etc.), and commercial item determination support, if applicable.

### 6.4.8 Schedule of Rates

Submit a schedule showing proposed direct and indirect rates by year. This schedule is to include (but separately identify) prime contractor, subcontractor, and inter-divisional transfer rates. *(Note: If subcontractor or inter-divisional rates are not available to the prime contractor, have the companies send them directly to the CO, referencing this solicitation number.*

### 6.4.9 Submission of Cost Models

*(If an offeror generated cost/price model is desired, use language such as the following :)*

Submit an electronically encoded cost/price model in support of the proposed price. Any cost/price model submitted must be consistent with your approved estimating system and must duplicate the logic and mathematical formulas reflected in the paper copy of your proposal. Cost/price models submitted must comply with the following format requirements:

(a) Data file should be submitted on a CD.

(b) Data file should be .XLS file format (MS-Excel 2007 or earlier) compatible format.

**6.4.10 Submission of Analysis of Uncertainty**

*(If the Cost/Price factor utilizes the Most Probably Cost (MPC) estimating process for an ACAT I program, include a paragraph substantially similar to the following.)*

The source selection evaluation for this program will utilize the Most Probable Cost (MPC) estimating process. In addition to providing the proposed cost/price information, the offeror shall provide an analysis of uncertainty as part of the cost/price volume. When preparing this analysis of uncertainty, offerors shall refer to and use as a guide, the “Air Force Cost and Risk Uncertainty Handbook,” located on the FM Knowledge Now Website at <https://afkm.wpafb.af.mil/afcruh>

# 7.0 Volume V ‑ Contract Documentation

## 7.1 Model Contract/Representations and Certifications

The purpose of this volume is to provide information to the Government for preparing the contract document and supporting file. The offeror's proposal shall include a signed copy of the Model Contract, and Sections A through K. This includes:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ *(Add subparagraphs for any other sections of the model contract requiring information from the offeror.)*

### 7.1.1 Section A - Solicitation/Contract Form

Completion of blocks \_\_\_\_\_\_(*insert specific blocks*) and signature and date for blocks \_\_\_\_\_(*insert block number*) and \_\_\_\_\_\_(*insert block number*) of the \_\_\_\_\_\_\_\_(*insert form number such as the SF33*). Signature by the offeror on the \_\_\_\_\_\_\_\_*(insert form number)* constitutes an offer, which the Government may accept. The "original" copy should be clearly marked under separate cover and should be provided without any punched holes.

### 7.1.2 Section B - Supplies or Services and Costs/Prices

Completed pricing information in Section B of the model contract.

### 7.1.3 Section F - Deliveries or Performance

(If the Government is allowing the offeror to propose its own delivery schedule, include the following:) (See Section L Guide for details)

Proposed Delivery Schedule. The offeror shall propose the delivery schedule by completing the blanks in Section F of the model contract. The proposed schedule is subject to the following guidance:

(Include any technical restrictions or constraints affecting the schedule that may be proposed.)

### 7.1.4 Section G - Contract Administrative Data

*(Tailor instructions for administrative information to be provided by the offeror).*

### 7.1.5 Section H - Special Contract Requirements

*(Tailor instructions for Section H special contract requirements that need to be completed by the offeror).*

### 7.1.6 Section I - Contract Clauses

*(Tailor instructions for Section I clauses that need to be completed by the offeror).*

### 7.1.7 Section K - Representations, Certifications, and other Statements of Offerors

*(Tailor instructions for representations, certifications, acknowledgements, and statements requiring explanation or instruction. See Section L Guide for details)*

Completed representations, certifications, acknowledgments and statements.

## 7.2 Exceptions to Solicitation Requirements

Offerors are required to meet all solicitation requirements, such as terms and conditions, representations and certifications, and technical requirements, in addition to those identified as evaluation factors or subfactors. Failure to meet a requirement may result in an offer being ineligible for award. Offerors must clearly identify any exception to the solicitation terms and conditions and provide complete accompanying rationale. Each exception shall be specifically related to each paragraph and/or specific part of the solicitation to which the exception is taken. Provide rationale in support of the exception and fully explain its impact, if any, on the performance, schedule, cost, and specific requirements of the solicitation. This information shall be provided in the format and content of Table 7.2.

**Table 7.2 - Solicitation Exceptions**

|  |  |  |  |
| --- | --- | --- | --- |
| ***Solicitation Document*** | ***Page/ Paragraph*** | ***Requirement/ Portion*** | ***Rationale*** |
| *SOO, SOW, SPEC, Model Contract*, ITO, etc. | *Applicable*  *Page and Paragraph*  *Numbers* | *Identify the requirement or portion to which exception is taken* | *Describe*  *why the requirement can/will not be met* |

## 7.3 Other Information Required

### 7.3.1 Authorized Offeror Personnel

Provide the name, title, and telephone number of the company/division point of contact regarding decisions made with respect to your proposal and who can obligate your company contractually. Also, identify those individuals authorized to negotiate with the Government. *(Additionally, you may want to ask for the name, title, and telephone number of the CEO, Division President, and/or Vice President, etc. The SSA may request these in order to contact his/her counterparts when notifying the successful and unsuccessful offerors of the award decision.)*

### 7.3.2 Government Offices

Provide the mailing address, telephone and fax numbers and facility codes for the cognizant Contract Administration Office, DCAA, and Government Paying Office. Also, provide the name and telephone and fax number for the Administrative Contracting Officer (ACO).

### 7.3.3 Company/Division Address, Identifying Codes, and Applicable Designations

Provide company/division's street address, county and facility code; CAGE code; DUNS code; TIN; size of business (large or small); and labor surplus area designation. This same information must be provided if the work for this contract will be performed at any other location(s). List all locations where work is to be performed and indicate whether such facility is a division, affiliate, or subcontractor, and the percentage of work to be performed at each location.

### 7.3.4 Attachments to the Model Contract

*(If the Integrated Product Development (IPD) concept is used, insert Attachment 4 paragraphs)*

The offeror shall provide the following as attachments to the model contract:

**7.3.4.1 Participation of Small Disadvantaged Businesses (SDB)**

*(NOTE: This provision applies in* ***all*** *competitive, negotiated acquisitions over $500,000 ($1M for construction), except for set-asides, 8(a) acquisitions, when the lowest price technically acceptable process is used, or when the contract will be performed entirely outside of the U.S. When* [*FAR 52.219-24*](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/52_215.htm)*, Small Disadvantaged Business Participation Program - Targets, is used, include the following instructions, which satisfy the requirements of* [*FAR 19.1202*](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/19.htm)*.)*

Pursuant to the requirements of [FAR 52.219-24](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/52_215.htm), each offeror must provide, with its offer, targets, expressed as dollars and percentages of total contract value, for SDB participation in any of the North American Industry Classification System (NAICS) Industry Subsectors as determined by the Department of Commerce. NAICS codes and titles are posted at: <http://www.census.gov/epcd/naics02/naicod02.htm>. The targets may provide for participation by a prime contractor, joint venture partner, teaming arrangement member, or subcontractor; however, the targets for subcontractors must be listed separately.

**7.3.4.2 Subcontracting Plan - Participation of Small Businesses (SB), Historically Black Colleges and Universities, or Minority Institutions (HBCU/MI)**

*(When* [*FAR 52.219-9*](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/52_215.htm)*, Small Business Subcontracting Plan, is used or when the solicitation involves bundling with a significant opportunity for subcontracting, include the following instructions, which satisfy the requirements of DFARS 215.304 and* [*FAR 15.304(c)(5)*](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/15.htm)*, respectively, to address, in the source selection, the extent of participation of small businesses and historically black colleges or universities and minority institutions in performance of the contract)*

If the offeror is other than a small business, the offeror shall submit a Small Business Subcontracting Plan in accordance with [FAR 52.219-9](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/52_215.htm) that also identifies and specifies the extent of offeror's commitment to the participation of small businesses (SB), historically black colleges or universities (HBCU) and minority institutions (MI), whether as joint venture members, teaming arrangement partners, or subcontractors. If applicable, submit a copy of your approved Master Plan. In the event the offeror has negotiated a comprehensive subcontracting plan pursuant to DFARS 219.702, the offeror must submit the information that identifies and specifies the extent of its commitment to the participation of SB, HBCU and MI.

**7.3.4.3 Make or Buy**

*(Applies to contracts valued in excess of $11.5M. See* [*FAR 15.407-2*](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/15.htm) *for exceptions and further information. See also SAF/AQ Memo “Selection of Contractors for Subsystems and Components” 7 Sep 04 for additional guidance on make-or-buy plans for ACAT I and II programs.)*

Include a Make or Buy Plan in accordance with [FAR 15.407-2](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/15.htm).

**7.3.4.4 GFP and/or Base Support Requirements**

The Government plans to provide the items listed in Attachment \_\_\_*(insert number)* of the solicitation as GFP/ (or Attachment \_\_\_*(insert number)* as Base Support). If the offeror requires the use of Government furnished items other than those specified, the offeror shall provide a listing including quantity, federal stock number, nomenclature, date needed and duration of availability, rental value per [FAR 45.1](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/45.htm) and [45.2](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/45.htm), reason for need, and cross reference to cost/price volume paragraphs which pertain to GFP and/or base support. The offeror shall also provide the written authorization from the cognizant ACO, as applicable. The offeror shall supply this information in the format shown in Table 7.3.

**Table 7.3 - Required Information for Using GFP/Base Support**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| ***Quan-tity*** | ***Federal***  ***Stock #*** | ***Nomen-clature*** | ***Duration***  ***of Need*** | ***Rental***  ***Value*** | ***Reason***  ***for Need*** | ***Cross Ref. to Cost Prop*** |
| 2 EA | FS156-09-234 | ACG-1372 Time Counter | 1 Oct 03 - 30 Dec 04 | $1,000 | Needed to calibrate our 5 mhz/1pps SATCOM simulator offset | Volume IV, pages 23 – 27, paragraphs A-C |

**7.3.4.5 Associate Contractor Agreements**

Include Associate Contractor Agreements, if applicable.

**7.3.4.6 Required Attachments**

*(Include any required attachments such as Contract Statement of Work (CSOW), Contract Work Breakdown Structure (CWBS), Integrated Master Plan (IMP), Integrated Master Schedule (IMS), Contract Data Requirements List (CDRL), Offeror’s Practices, etc. Add instructions/descriptions of all attachments required to be submitted by the offeror.)*

*(Insert the following into the L-III paragraphs denoted and with the proper factor or sub-factor)*

*(Insert all the following, as applicable, after paragraph 7.3.4.6, Required Attachments)*

*[begin insertion]*

**7.3.4.6.1 Contract Work Breakdown Structure (CWBS) and CWBS Dictionary**

A Preliminary Work Breakdown Structure (PWBS) for the \_\_\_\_\_\_\_\_\_*(insert program name)* has been provided as Attachment \_\_ *(insert attachment number)* to the solicitation. The reference document for developing the WBS and dictionary is MIL-HDBK-881. The offeror shall develop a Contract Work Breakdown Structure (CWBS) and dictionary, which reflects their view of the contract effort. The CWBS shall serve as the framework for organizing \_\_\_\_\_\_\_\_\_\_\_ *(insert program name)* to include in-house, inter-divisional, subcontractor, and associate contractor activities. The offeror may add, re-arrange, and/or combine the PWBS elements shown in accordance with their approach, but supporting rationale shall be provided. The CWBS shall be developed to a depth (level) and breadth sufficient to accurately describe the offeror's understanding of the effort required for the \_\_\_\_\_\_\_\_\_\_\_\_ *(insert program name)* as reflected in the SOW. The offeror's proposed CWBS and corresponding dictionary shall be provided as part of the model contract. The mapping of CLINs to WBS elements shall be completely consistent with that shown in Section B of the Model Contract.

**7.3.4.6.2 Contract Statement of Work (CSOW)**

A Statement of Objectives (SOO) is provided as Attachment \_\_ *(insert number)* to the solicitation. This SOO represents the Government's minimum objectives for the \_\_\_\_\_\_\_\_\_\_\_ *(insert program name)*. The offeror shall use the SOO to propose a WBS-structured SOW (known as CSOW) which expands upon these minimum objectives to the extent necessary to conduct this acquisition. The proposed CSOW shall define the tasks required for the \_\_\_\_\_\_\_\_\_\_ *(insert program name)* ensuring all minimum requirements of the Government provided SOO and preliminary WBS have been addressed. The proposed CSOW shall consist of tasking statements. Each tasking statement shall reference the CDRL items which will be delivered by that task. The proposed CSOW shall not contain informational notes, as the Mission Capability volume provides ample opportunity for discussion and description of the offeror's approach, and the IMP and IMS provide the mechanisms for describing specific details of the offeror's approach. The tasking statements in the CSOW, elements of the CWBS, and the IMP and IMS sections shall use a common numbering system. The proposed CSOW, when accepted by the Government, will be put on contract at award.

**7.3.4.6.3 Applicable Documents**

A list of Applicable Documents has been provided to the offerors as an annex to the SOO/SOW attachment in the solicitation, which includes a minimum list of Government Compliance Documents. The offeror shall provide a list of any offeror, industry, commercial, and tailored Government standards, specifications, processes, and/or practices selected as compliance documents. The offeror shall also provide a list of all Government compliance documents intended to be used as compliance documents during the course of this contract. The offeror shall submit a list of these documents, including any tailoring instructions, as an annex to the proposed SOW. The offeror shall submit the completed Proposed Compliance Documents as a separately bound document.

**7.3.4.6.4 Integrated Master Plan (IMP)**

The purpose of the IMP is to demonstrate that the \_\_\_\_\_\_\_\_\_\_\_\_\_\_ *(insert program name)* program is structured to minimize and control risk, to accomplish up-front summary planning and commitment, to provide a basis for subsequent detailed planning, to instill a balanced design discipline, to measure progress of \_\_\_\_\_\_\_\_\_\_\_\_\_ *(insert program name)* program life-cycle requirements, and to provide management with in-process verification of requirements in order to make informed milestone decisions.

The IMP is an offeror-generated document, capturing the core activities and processes necessary to implement the program. The IMP shall be written as an event-based plan containing significant accomplishments and accomplishment criteria needed to successfully complete each major program milestone. IMP milestones shall be event-oriented and represent integrated product development (encompassing all functional disciplines) of the CWBS elements. The IMP measures program maturity by marking the initiation/conclusion of events/milestones, significant accomplishments, and associated completion criteria which describe the total work effort necessary to acquire a system which meets contract requirements. The IMP shall contain narratives that provide the Government a planning and management tool for providing additional insight into the offeror's total work effort and for addressing how the offeror will develop, implement, and commit to the total contracted effort.

The offeror's overall approach shall provide traceability from the system-level requirements (given in the system-level specification) through the offeror's CWBS and SOW to the IMP and IMS, and to the IPT organization. The IMP shall be a single plan for the entire effort, including associate and/or major subcontractor activities. There shall be an IMP section/subsection for each of the elements in the offeror's proposed CWBS, as linked to the SOW. Each section/ subsection of the IMP shall contain Events, Significant Accomplishments, Accomplishment Criteria, and selected Narratives as called for in the example SOW. The traceability to IPT organization allocates responsibility and accountability and should indicate primary and supporting IPTs.

a. Event: An IMP event is a key contractual or programmatic event defined by the Government or the offeror, which defines progress at a specific point in time. IMP events mark the conclusion/initiation of intervals of major program activity and serve as decision-oriented measures of program activity related to the program’s maturity associated with continued system development. The offeror is encouraged to identify incremental reviews and milestones and additional events that best reflect the proposed program approach. The offeror shall include definitions of each event at the beginning of the IMP. IMP events shall be properly sequenced and may include demonstration milestones, technical or program reviews and audits, and other key decision points. For each IMP event, there shall be one or more entry or exit significant accomplishments (either entry or exit).

b. Significant Accomplishment: Significant accomplishments are interim or final critical efforts that must be completed prior to entering or exiting an event. Significant accomplishments are organized first by the CWBS element/product and then by functional area. Entry accomplishments reflect what must be complete to initiate an event. Exit accomplishments reflect what must be done in order for the event to be successfully closed and that \_\_\_\_\_\_\_\_\_\_\_\_\_\_ *(insert program name)* is ready for the next event. For each significant accomplishment, there shall be one or more accomplishment criteria. Significant accomplishments include:

1. A desired result at a specified event which indicates a level of design maturity,
2. A discrete step in a process,
3. A description of interrelationship between different functional disciplines.

The Government is seeking Significant Accomplishments that provide sufficient insight to the process for achieving objectives of the SOO. The accomplishments shall be sequenced in a manner that ensures a logical path is maintained throughout the effort and tracks against key events.

c. Accomplishment Criteria: Measurable and useful indicators demonstrating that the required level of maturity/progress in an associated significant accomplishment has been achieved. Accomplishment criteria include:

1. Completed work efforts,
2. Activities which confirm the value of the technical parameters,
3. Internal documents which provide results of in-process verification (successfully completed analysis or other testing activities),
4. Completion of critical activities required by the offeror’s internal program plans/operating instructions.

Accomplishment Criteria shall include the use of Technical Performance Measures (TPMs) and metrics to track detailed tasking in the IMS. Preferably, the accomplishment criteria should avoid the use of ‘percent completed’ and avoid citing data item report numbers rather than identifying and summarizing results.

d. Narratives: Narratives are a collection of concise statements, with flow diagrams as necessary, describing the offeror's key functional/management processes and procedures. The IMP narrative is used to supplement IMP accomplishments and associated criteria, provide insight into any SOW tasks not described by IMP accomplishments /criteria, and implement the IPD process. In particular, a narrative should provide enough information to identify where the accomplishment criteria apply, (i.e., “pickoff points”) on the associated process. The narrative describes the minimum essential processes that the offeror will apply to their products in conformance with Government requirements.

The narratives shall complement the significant accomplishment and accomplishment criteria by indicating where in the particular process the criteria apply. The concise statements, in addition to describing the offeror's key functional/management processes and procedures, shall describe their relationship to the IPD process and an overview of the efforts required to implement them. The narrative shall address only the key elements of implementing or developing a process/procedure (i.e., what the process/procedure will be and how it will be implemented and tracked), since the narrative will be included in the contract. The narrative is not the forum for providing supporting information/rationale (i.e., why a particular approach has been taken ). Each narrative subject area shall be arranged in the following format: A. Objective; B. Identification of Governing Documentation: and C. Process (if applicable). The Objective is a brief statement of desired results and is to be traceable to the SOO. The Governing Documentation lists the Government documents and/or offeror practices or procedures to be used to achieve the objective. The offeror shall clearly state whether Government documents will be tailored further and reference in which of the offeror’s compliance documentation they will be tailored. The narrative shall be consistent with applicable technical and management approaches described in the Mission Capability volume of the proposal.

**7.3.4.6.5 IMP Considerations**

The offeror shall include the following specific areas of Government interest with narratives in the IMP (not listed in order of importance):

*(The following IMP Considerations are examples; the actual list should be tailored and supplemented for the specific program)*

a. Specialty Engineering Disciplines, (e.g. – Reliability & Maintainability, System Safety, Human Engineering, etc.)

b. Integrated Logistics Support, such as training, tech order publications, and Non-Developmental Item/Commercial-off-the-Shelf utilization and support

c. Transition Planning

d. Configuration Management Planning and Transition Configuration Management Planning

e. Software development plan that identifies:

(1) Integration between systems engineering processes and software development processes.

(2) Assurance of software quality.

(3) Development, Test and Evaluation (DT&E) and Operational Test and Evaluation (OT&E) planning, including completion of the Verification Cross Reference Matrix and participation in DT&E/OT&E

(4) Internal and external interface and external interface implementation, control planning and support for other AFSCN contractors, as necessary

(5) Development change control planning

(6) A plan for phase-in from predecessor to (insert program name)

(7) Planning for reduction of life cycle costs

Additionally, the offeror shall consider the following when preparing the IMP:

a. Failure and Deficiency Reporting, Analysis, and Corrective Action

b. Government-Furnished Property Utilization

c. System Security Engineering Management Planning

d. System Safety/Health Risk Engineering, Environmental and Hazardous Materials Management, and Hazard Status Reporting

e. Quality program planning

f. Planning for handling deviations and waivers

g. Planning for information data exchange with Government

h. Planning for subcontractor and associate contractor relationships

**7.3.4.6.6 Integrated Master Schedule (IMS)**

The intent of this section is to obtain a functionally integrated understanding of the proposal with clear tracks between the technical, cost, schedule, management, etc., in a way that provides the Government confidence that the program is structured to be executable for the resources indicated. The IMS is a detailed task and timing of the work effort in the IMP and is used as the primary tracking tool for technical and schedule status.

The IMS is an integrated and networked multi-layered schedule of program/project tasks. The IMS identifies all IMP events, accomplishment, and criteria and the expected dates of each. These dates are based on the calendar dates provided as the starting point and the logical flow of dates provided by calculating the addition of duration of all tasks using typical schedule networking tools. The IMS tasks will be directly traceable to the WBS, IMP, SOW, and CLINs.

The offeror shall provide a top-level IMS as part of the proposal submittal. The more detailed levels of the IMS, as well as updates, will be submitted after contract award as a CDRL deliverable. The IMS is intended as a tool for day-to-day tracking of the program/project that rolls up to increasingly higher summary levels. All tasks/activities in the IMS should be logically linked together showing predecessor/successor relationships. The activities and tasks will be sufficient to account for the entire program under contract. Key elements of the IMS include:

a. Milestone/Event - A specific definable accomplishment in the program/project network, recognizable at a particular point in time.

b. Activity or Task - A time consuming element, e.g., work in progress between interdependent events, represented in an activity box. Activities are numbered and are contained within an activity box. The left side represents the beginning of the activity, and the right side is the completion of the activity.

c. Duration - The length of time estimated to accomplish an activity (disregarding the “calendar impact"). Rationale should also be provided supporting the derivation of the durations including ground rules and assumptions (e.g., historical data, experience on similar efforts, vendor schedules, number of work days per week, number of shifts, company holidays). In addition, the offeror shall provide a supporting narrative for the network diagram that explains the basis for the estimated durations of those activities on the critical path(s) and for activities designated as high risk. Any unusual aspects of their proposed approach to the program shall also be described.

d. Constraint - A line that defines how two activities or events are logically linked.

1. Finish-to-Start (FS) - An activity must finish before another can start. The offeror shall provide a brief narrative for all activities that do not have FS relationships and how the respective relationship was determined and the lead or lag estimated.
2. Start-to-Start (SS) - An activity depends on the start of another activity
3. Finish-to-Finish (FF) - One activity cannot finish until another activity finishes.
4. Start-to- Finish (SF) - An activity cannot finish until another activity starts.
5. Percent Complete or Lead Lag

e. Total Slack or Float - Extra time available on an activity before it will impact another activity on the critical path.

f. Free Slack or Float - Extra time available on an activity before it will impact an activity on another successor activity.

g. Lead - The amount of time of the overlap between where a successor task begins and a predecessor task completes.

h. Lag - The amount of time between the end of a predecessor task and the beginning of a successor task.

i. Critical Path - A sequence of activities in the network that has the longest total duration through the program/project. Activities along the critical path have zero or negative slack/float. It should be easily distinguished on the report formats.

j. Target Start (TS) - Date when an activity should start.

k. Target Complete (TC) - Date when an activity should finish.

l. Actual Start (AS) - Actual start date of an activity.

m. Actual Finish (AF) - Actual finish date of an activity.

n. Early Start (ES) - The earliest date an activity can start.

o. Early Finish (EF) - The earliest date an activity can end.

p. Late Start (LS) - The latest date an activity can start without delaying the program/project target completion date.

q. Late Finish (LF) - The latest finish date an activity can have without affecting the program/project target completion date.

r. Gantt Chart - A graphical display of program activities and key milestones that depict work activities in an integrated fashion. Represent activities by bars showing the length of time for each activity.

The offeror shall also provide a resource-loaded Gantt chart for all high risk areas in the program, including separate charts for critical subcontract efforts. *(High risk WBS elements may be explicitly identified by the Government.)* In addition, the offeror shall provide resource-loaded schedules for other risk areas that are unique to their proposal based on offeror’s analysis. For each of these high-risk areas, the offeror shall provide minimum and maximum durations for the summary-level activity/WBS. The resource loading shall be represented by functional hours for labor and by material content. These hours shall be time phased by quarter with a recurring/non-recurring breakout for each quarter using the attached resource loaded Gantt chart.

*[end of insertion]*

# ATTACHMENT 1: CROSS REFERENCE MATRIX

*(See Section L Guide, paragraph 3.13 for an explanation of the purpose of this attachment.)*

*(An example of the format is given below:)*

**For Prospective Offerors**: See paragraph 2.2.4 regarding instructions for completion of the solicitation Cross-Reference Matrix. If this matrix conflicts with any other requirement, direction, or provision of this solicitation, the other reference shall take precedence over this matrix. Additionally, to the extent this matrix discloses details as to the extent or manner by which the Government intends to evaluate offeror’s proposals for award, Section M references in the matrix are for information purposes only, and the Government shall be obligated to evaluate proposals solely in conformance with the provisions of the Section M of the solicitation.

An example of the format is shown below:

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| ***SOLICITATION CROSS REFERENCE MATRIX*** | | | | | | | | | | |
| *REQ.* | *WORK* | *WBS* | *CLIN* | *Section* | *Section* | *Proposal* | *SOW* | *CDRL* | *IMP* | *SOO* |
| *DOC* | *REQ* | *LEVEL* |  | *L* | *M* |  |  |  |  |  |
| *3.2.2* | *Design B* | *2* | *0001* |  |  |  |  | *N/A* |  |  |
| *3.3.3* | *Build A* | *2* | *0002* | *3.B.2* |  |  |  | *A001* |  |  |

# ATTACHMENT 2: PAST PERFORMANCE INFORMATION

Provide the information requested in this form for each contract/program (citation) being described. Provide frank, concise comments regarding your performance on the contracts you identify. Provide a separate completed form for each contract/program submitted. Limit the number of citations submitted and the length of each submission to the limitations set forth at paragraphs 5.3 and 2.2, respectively, of Section L-III of this solicitation.

A. Offeror Name (Company/Division): **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

CAGE Code: **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

DUNS Number: **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

(NOTE: If the company or division performing this effort is different than the offeror or the relevance of this effort to the instant acquisition is impacted by any company/corporate organizational change, note those changes. Refer to the "Organizational Structure Change History" you provided as part of your Past Performance Volume.)

B. Program Title: **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

C. Contract Specifics:

1. Contracting Agency or Customer \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

2. Contract Number \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

3. Contract Type \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

4. Period of Performance \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

5. Initial Contract Cost/Price \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 6. Current/final Contract Cost/Price \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

7. Annual Contract $ Value \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

8. If Amounts for 5 and 6 above are different, provide a brief description of the reason \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

D. Brief Description of Effort as \_\_Prime or \_\_Subcontractor

(Please indicate whether it was development and/or production, or other acquisition phase and highlight portions considered most relevant to current acquisition)

E. Completion Date:

1. Original date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

2. Current Schedule: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

3. Estimate at Completion: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

4. How Many Times Changed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

5. Primary Causes of Change: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

F. Primary Customer Points of Contact: (For Government contracts, provide current information on all three individuals. For commercial contracts, provide points of contact fulfilling these same roles.)

1. Program Manager: Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Office \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

Telephone \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

2. Contracting Officer: Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Office \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

Telephone \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

3. Administrative Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Contracting Officer Office \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

Telephone \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

G. Address any technical (or other) area about this contract/program considered unique.

H. For each of the applicable subfactors under the Mission Capability factor in Section M, illustrate how your experience on this program applies to that subfactor.

I. Specify, by name, any key individual(s) who participated in this program and are proposed to support the instant acquisition. Also, indicate their contractual roles for both acquisitions.

J. Include relevant information concerning your compliance with subcontracting plan goals for small disadvantaged business (SDB) concerns, monetary targets for SDB participation, and notifications submitted under [FAR 52.219-25](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/52_215.htm), Small Disadvantaged Business Participation Program—Disadvantaged Status and Reporting.

*(If* [*FAR 52.219-8*](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/52_215.htm)*, Utilization of Small Business Concerns, is included in Section I of the solicitation, insert the paragraph below to comply with the past performance evaluation requirement of DFARS 215.305(a)(2).)*

K. Include relevant information concerning your compliance with [FAR 52.219-8](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/52_215.htm), Utilization of Small Business Concerns, on the contract you are submitting.

*(If* [*FAR 52.219-9*](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/52_215.htm)*, Small Business Subcontracting Plan, is included in Section I of the solicitation or if the solicitation involves bundling, insert the paragraph below to comply with the past performance evaluation requirement of DFARS 215.305(a)(2) or FAR 15.304(c)(3)(iii), respectively.)*

L. Identify whether a subcontracting plan in accordance with [FAR 52.219-9](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/52_215.htm), Small Business Subcontracting Plan, was required by the contract you are submitting. If one was required, identify, in percentage terms, the planned versus achieved goals during contract performance. If goals were not met, please explain.

M. Describe the nature or portion of the work on the proposed effort to be performed by the business entity being reported here. Also, estimate the percentage of the total proposed effort to be performed by this entity and whether this entity will be performing as the prime, subcontractor, or a corporate division related to the prime (define relationship). ***(This is especially important if requesting the Past Performance volume early, as the PCAG will not have any other source for this information, which is critical to their relevancy determination)***

*(Insert and tailor the paragraph below to obtain Earned Value Management data on prior contracts.)*

N. Identify any Earned Value Management (EVM) or similar metrics required to track contract performance. If such metrics were required for this contract, provide the summary level data.

# ATTACHMENT 3: PAST PERFORMANCE QUESTIONNAIRE

*(This questionnaire is intended as a sample. Tailor the questionnaire to your mission capability subfactors/cost/price to solicit the information your PCAG will need to make their Performance Confidence Assessment. See also* [*IG5315.305(a)(2)*](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/af_afmc/affars/IG5315.305(a)(2).docx)*, Past Performance Evaluation Guide, for additional guidance on preparing the questionnaire. This questionnaire should be accompanied by a transmittal letter explaining its purpose.)*

*When filled in this document is source selection sensitive information iaw* [*FAR 3.104*](http://farsite.hill.af.mil/reghtml/regs/far2afmcfars/fardfars/far/03.htm)

SECTION 1: CONTRACT IDENTIFICATION

1. Contractor: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. Cage Code of contractor contract was awarded to: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
3. Contract number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
4. Contract type: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
5. Was this a competitive contract? Yes \_\_\_\_\_ No \_\_\_\_\_
6. Period of performance: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
7. Initial contract cost: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
8. Current/final contract cost: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
9. Reasons for differences between initial contract cost and final contract costs: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

1. Description of service provided:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

**SECTION 2. CUSTOMER OR AGENCY IDENTIFICATION**

1. Customer or agency name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. Customer or agency description (if applicable): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
3. Geographic description of services under this contract, i.e. local, nationwide, worldwide, other Commands:

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

**SECTION 3. EVALUATOR IDENTIFICATION**

1. Evaluator's name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. Evaluator's title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
3. Evaluator's phone/fax number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

D. Number of years evaluator worked on subject contract: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**SECTION 4: EVALUATION**

Please indicate your satisfaction with the contractor’s performance by placing an “**X**” in the appropriate block using the scale provided to the right of each question. This scale is defined as follows:

CODE PERFORMANCE LEVEL

B BLUE/EXCEPTIONAL - The contractor’s performance meets contractual requirements and exceeds many (requirements) to the Government’s benefit. The contractual performance was accomplished with few minor problems for which corrective actions taken by the contractor were highly effective.

P PURPLE/VERY GOOD- The contractor’s performance meets contractual requirements and exceeds some (requirements) to the Government’s benefit. The contractual performance was accomplished with some minor problems for which corrective actions taken by the contractor were effective.

G GREEN/SATISFACTORY – The contractor’s performance meets contractual requirements. The contractual performance contained some minor problems for which corrective actions taken by the contractor appear or were satisfactory.

Y YELLOW/MARGINAL – Performance does not meet some contractual requirements. The contractual performance reflects a serious problem for which the contractor has not yet identified corrective actions or the contractor’s proposed actions appear only marginally effective or were not fully implemented.

R RED/UNSATISFACTORY – Performance does not meet most contractual requirements and recovery is not likely in a timely manner. The contractual performance contains serious problem(s) for which the contractor’s corrective actions appear or were ineffective.

N NOT APPLICABLE - Unable to provide a score.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| B | **P** | **G** | **Y** | **R** | **N** |

Technical Performance

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| T1 Quality & repeatability of operations & maintenance. |  |  |  |  |  |  |
| T2. Quality of technical system testing and certification efforts |  |  |  |  |  |  |
| T3 Quality/integrity of technical data/report preparation efforts |  |  |  |  |  |  |
| T4 Adequacy/effectiveness of quality control program and adherence to contract quality assurance requirements |  |  |  |  |  |  |
| T5 Ability to implement current standard practices for computer hardware design, operation, maintenance, upgrades and configuration control |  |  |  |  |  |  |
| T6 Ability to implement current standard practices for computer software design, operation, maintenance, upgrades and configuration control |  |  |  |  |  |  |
| T7 Adequacy/effectiveness of environmental safety procedures |  |  |  |  |  |  |

**Program Management**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| P1. Effectiveness of overall contract management (including ability to effectively lead, manage and control the program) |  |  |  |  |  |  |
| P2. Contractor was reasonable and cooperative in dealing with your staff (including the ability to successfully resolve disagreements/disputes) |  |  |  |  |  |  |
| P3. Timeliness/effectiveness of contract problem resolution without extensive customer guidance |  |  |  |  |  |  |
| P4. Understand/complied with customer objectives and technical requirements |  |  |  |  |  |  |
| P5. Successfully responded to emergency and/or surge situations |  |  |  |  |  |  |
| P6. Quality/effectiveness of sub-contracted efforts |  |  |  |  |  |  |
| P7. Effectiveness of material management (including Government Furnished Property or Material) |  |  |  |  |  |  |
| P8. Effectiveness of acquisition management |  |  |  |  |  |  |
| P9. Contractor proposed alternative methods/processes that reduced cost, improved maintainability or other factors that benefited the customer |  |  |  |  |  |  |
| P10. Contractor implemented responsive/flexible processes to improve quality and timeliness of support. |  |  |  |  |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **B** | **P** | **G** | **Y** | **R** | **N** |

**Transition/phase-in**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| T/PI1. Contractor ability to smoothly transition resources and personnel. |  |  |  |  |  |  |
| T/PI2. Contractor effectiveness on maintaining continuity of mission support while transitioning/phasing in resources and personnel to support other efforts. |  |  |  |  |  |  |

**Employee Retention/Attraction**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| E1. Ability to hire/apply a qualified workforce to this effort. |  |  |  |  |  |  |
| E2. Ability to retain a qualified workforce on this effort. |  |  |  |  |  |  |
| E3. Effectiveness of employee compensation towards quality of work. |  |  |  |  |  |  |

**Small and Small Disadvantaged Business Participation**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| S1. Ability to meet or exceed small business and small disadvantaged business goals set forth in the approved subcontracting plan |  |  |  |  |  |  |
| S2. Ability to effectively manage small business participation to meet technical performance. |  |  |  |  |  |  |

Cost Performance

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| C1 Accuracy in forecasting contract costs |  |  |  |  |  |  |
| C2 Ability to meet forecasted costs and perform within contract costs |  |  |  |  |  |  |
| C3 Ability to alert Government of unforeseen costs before they occur |  |  |  |  |  |  |
| C4 Sufficiency and timeliness of cost reporting |  |  |  |  |  |  |

2. Please discuss each and every response for which you indicated B/E (Blue/Exceptional), P/VG (Purple/Very Good), Y/M (Yellow/Marginal) or R/U (Red/Unsatisfactory) in response to the questions above (use additional sheets, if necessary).

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

3. Government Contracts Only: Has/was this contract been partially or completely terminated for default or convenience or are there any pending terminations?

Yes\_\_\_ Default\_\_\_ Convenience\_\_\_ Pending Terminations\_\_\_

No \_\_\_

If yes, please explain (e.g., inability to meet cost, performance, or delivery schedules, etc).

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

**SECTION 5: NARRATIVE SUMMARY**

What were the contractor’s most positive aspects in the performance of the contract?

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_What were the contractor’s most negative aspect in the performance of the contract? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Would you have any reservations about soliciting this contractor in the future or having them perform one of your critical and demanding programs?

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

Please provide any additional comments concerning this contractor’s performance, as desired.

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

Evaluator’s Signature Date

**Thank you for your prompt response and assistance!**

*Please return this completed questionnaire to:*

Mailing Address:

Or FAX to:

**ATTACHMENT 4:** **Subcontractor/Teaming Partner Consent Letter**

**for the Release of Past and Present Performance Information**

**to the Prime Contractor**

Past performance information concerning subcontractors and teaming partners cannot be disclosed to a private party without the subcontractor’s or teaming partner’s consent. Because a prime contractor is a private party, the Government will need that consent before disclosing subcontractor/teaming partner past and present performance information to the prime contractor during exchanges. In an effort to assist the Government’s Performance Confidence Assessment Group (PCAG) in assessing your past performance relevancy and confidence, we request that the following consent letter be completed by the major subcontractors/teaming partners identified in your proposal. The completed consent letters should be submitted as part of your Present/Past Performance Volume.

*SAMPLE*

Dear “Contracting Officer:”

We are participating as a (subcontractor/teaming partner) with (prime contractor or name of entity providing proposal) in responding to the Department of the Air Force, XXXX Air Force Base, Request for Proposal XXXXXX-XX-R-XXXX for XXXXXX contract.

We understand that the Government is placing increased emphasis on past performance in order to obtain best value in source selections. In order to facilitate the performance confidence assessment process we are signing this consent letter to allow you to discuss our past and present performance information with the prime contractor during the source selection process.

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

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

(Signature and title of individual who has the authority to sign for and legally bind the company)

Company Name:

Address:

## ATTACHMENT 5: CLIENT AUTHORIZATION LETTER

Past performance information concerning private sector contractors, subcontractors and joint venture partners cannot be disclosed to the government without their consent. Client authorization letters are required for each identified effort for a commercial customer. This letter will authorize release to the Government of requested information on the offeror's performance. The government will need that consent before contacting commercial customers to assess the offeror’s past performance. In an effort to assist the Government's Performance Confidence Assessment Group (PCAG) in assessing your past performance relevancy and confidence, we request that the following client authorization letter be completed by any commercial customers identified in your proposal. The completed client authorization letters should be submitted as part of your Present/Past Performance Volume.

Offerors should send with their list of references a letter similar to the following authorizing the reference to provide past performance information to the Government.

Dear “Client:”

We are responding to a Department of the Air Force, XXX Air Force Base Request for Proposal XXXXXX-XX-R-XXXX for the XXXXXX contract.

In their acquisitions, the government is placing increased emphasis on past performance as a source selection factor. They are requiring those clients of entities responding to their solicitation to be identified, and their participation in the evaluation process is requested. In the event that you are contacted for information on work performed, you are hereby authorized to respond to those inquiries.

We have identified Mr./Ms.\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ of your organization as the point of contact based on his/her knowledge of our work. Your cooperation is appreciated. Any questions may be directed to .

Sincerely,

1. Although Section L is referenced, this guide and template may be applicable for use in commercial acquisitions with modifications as appropriate. [↑](#footnote-ref-1)
2. This guide and template should be modified as appropriate for use in acquisitions using the Lowest Price Technically Acceptable (LPTA) or Performance Price Tradeoff (PPT) process. [↑](#footnote-ref-2)
3. Program office is synonymous with “requesting organization” for locations conducting source selections without program offices/managers. [↑](#footnote-ref-3)