**Attachment J-15**

**Past Performance Questionnaire (IT Management Services)**

This attachment is in support of the Evolve Solicitation

NOTE: For each Relevant Experience Project (REP) (Attachment J-14) submitted, the Offeror must submit either a completed Contractor Performance Assessment Reporting System (CPARS) evaluation or this Attachment. If CPARS evaluation is available, it **must** be used and this Attachment J-15 should not be submitted.

**PAST PERFORMANCE PROJECT IDENTIFICATION (*To be filled out by the Offeror*):**

|  |  |
| --- | --- |
| Offeror Name: | Click here to enter text. |
| Contract Number: | Click here to enter text. |
| Order Number (if applicable): | Click here to enter text. |
| Project Title: | Click here to enter text. |
| Total Period of Performance, Including Options: MM/YYYY - MM/YYYY or MM/YYYY - Present | Click here to enter text. |

**PAST PERFORMANCE REFERENCE INFORMATION (*To be filled out by the Rater*):**

|  |  |
| --- | --- |
| Name: | Click here to enter text. |
| Title: | Click here to enter text. |
| Agency or Customer Organization: | Click here to enter text. |
| Phone: | Click here to enter text. |
| E-mail: | Click here to enter text. |
| Signature of Rater[[1]](#footnote-2): |  |

Any questions concerning completion of this form should be addressed to [insert DOS name and email address].

##### INSTRUCTIONS

This questionnaire is to be completed as indicated below. For purposes of these evaluations, the term “client engagement” is intended to mean “contract”. This package consists of the following:

| **Section** | **Description** | **Who completes** | **Who verifies** |
| --- | --- | --- | --- |
| Section 1 | Authorization Letter | Offeror | N/A |
| Section 2 | Client Engagement Profile | Offeror | Client Point of Contact |
| Section 3 | Client Identification | Client Point of Contact | None |
| Section 4 | Evaluation | Client Point of Contact | None |
| Section 5 | Past Performance Summary | Client Point of Contact | None |

**SECTION 1: AUTHORIZATION LETTER**

(To be completed by the Offeror)

**Past Performance Form Letter Example**

(This form letter is provided with the RFP for Offerors to use in transmitting the Past Performance questionnaire to past or current clients)

[*Date of Letter*]

[*Name and Address of Offeror’s client]*

Attention: [*Name and Designation of Client’s Contract Manager or Appropriate Contact*]

Dear [*Contact Name*]:

We are currently responding to the U.S. Department of State (DOS) Evolve Solicitation. DOS is requesting organizations or companies responding to the solicitation to submit evidence of past performance. Through this letter we are requesting your participation to provide an assessment of our firm’s performance. If you are contacted for information on work our firm has performed outside of this written assessment, you are hereby authorized to respond to those inquiries. Your firm’s cooperation with this effort is greatly appreciated. Please direct any questions to [Insert Name and Phone Number for Offeror].

For your reference, we have included a description of the work our firm performed/is performing for your organization. A Past Performance Questionnaire is also enclosed for you to complete. Please verify the accuracy of the data in Sections 2 and 3 of the enclosed evaluation. Then, please complete Sections 4 and 5 and return the signed, completed document by DATE /TIME to [insert].

Sincerely,

[Name of Signer]

[Designation of Signer]

**Past Performance Questionnaire**

**Evolve Acquisition**

**Solicitation # XYZ**

When completed, this document contains procurement sensitive information.

**SECTION 2A: CLIENT ENGAGEMENT PROFILE**

(To be completed by the Offeror and verified by the Client Point of Contact (POC))

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Client Organization Name: |  | | | | | |
| U.S. Federal Government Department and Agency (if applicable) |  | | | | | |
| Contractor Name: |  | | | | | |
| Subcontractors and Partners (if any): |  | | | | | |
| Contract Type:  (e.g., Time and Materials, Fixed Price, Unit-based, Asset-based, etc. or Combination/Hybrid)  Please explain fully. |  | | | | | |
| Was this a Competitive Contract? | Yes |  |  | No |  |  |
| Total period of performance, including options: (MM/YYYY - MM/YYYY or MM/YYYY – Present) |  | | | | | |
| Summary Description of Services Provided: |  | | | | | |
| Geographic Coverage of Services for This Contract:  (e.g., Local, National, Global) |  | | | | | |
| Project size  (e.g., the number of employees and various departments in the organization for which work was performed/is being performed) |  | | | | | |
| Project complexity  (e.g., the multiple dimensions/business units/departments for which an IT budget was developed) |  | | | | | |

| **SECTION 2B: ENGAGEMENT RELEVANCY TO THE FUNCTIONAL CATEGORY’S CAPABILITIES**  (To be completed by the Offeror and verified by the Client POC). Please indicate which of the following capabilities this Past Performance Survey addresses (more than one can be indicated, if applicable). If the Offeror believes that a capability related to this category is relevant but is not represented by the ones already listed, please enter it in the space designated in the table below: |
| --- |

|  |  |  |
| --- | --- | --- |
| **Sub-Capability Area** | **Primary Objective** | **Covered in this Project? (Y/N)** |
| **Portfolio Management** | |
| PMO Support | Provide input and support for programmatic activities related to contract tasks. |  |
| Strategic Communications and Engagement | Manage the program’s strategic communications and engagement activities, including development of supporting artifacts. |  |
| Strategic Planning | Conduct long term visioning and planning for the direction of IRM and DOS IT systems |  |
| Performance Management | Monitor and report on the contractor’s performance to meet mutually agreed upon measures and targets. |  |
| Program Management | Manage the IDIQ contract and task orders. |  |
| Transition Management | Facilitate and manage contractor transitions to ensure continuity of support and to maintain system availability, reliability, and customer satisfaction performance standards. |  |
| Finance and Budget | Provides planning, budgeting, spend management, chargeback, tracking, reporting, and auditing of IT expenditures and the costing of IT products and services. |  |
| Process Improvement Consulting | Provide process improvement consulting services with a roadmap to improve efficiency, strengthen system driven management controls, improve security, modernize systems, improve processes or develop them where they don’t exist, and reduce cost. |  |
| Executive Program | Provide CIO-to DAS level or equivalent executive support to bureaus at the executive level in supporting the coordination, planning, business process review and reengineering, special project research (including prototyping), and strategic communication |  |
| **Cybersecurity & Compliance** | | |
| Cyber Security & Incident Response | Provides policies, procedures, and technologies to recognize existing and emerging threats as well as determine associated risk to ensure the organization has the appropriate defense and responses to each incident. |  |
| Governance, Risk, Audit, and Compliance | Provides strategy, policies, and processes for managing an overall governance, enterprise risk management and compliance with regulations, with regards to IT. Provides structured approach for aligning IT with business goals and objectives, while managing risk and meeting compliance requirements. |  |
| **Architecture** | | |
| Architecture | Develop technological roadmaps, plans, and strategies to secure the global network and its resources. This includes strategies for least privilege access, micro-segmentations, data usage controls, continuous monitoring, auditing, *etc.* |  |

**SECTION 3: CLIENT IDENTIFICATION**

(To be completed by the Client POC)

|  |  |  |
| --- | --- | --- |
| POC Name: |  | |
| Client POC Title/Position: |  | |
| Client POC Email Address: |  | |
| Client POC Phone Number: |  | |
| Number of years the Client POC was associated with this engagement: | |  |
| Is Section 2 of this questionnaire accurate?  If No, please explain: | | Yes/No |

**SECTION 4: EVALUATION**

(To be completed by the Client POC)

Evaluation — Please indicate your satisfaction with the service provider’s performance by placing a “X” in the appropriate block using the rating scales to the right of each dimension. Additionally, if desired, please provide a narrative explanation to support your ratings. At a minimum, for any Marginal or Unsatisfactory rating, please submit additional comments to substantiate the rating. For any rating that is checked Not Applicable, please explain why it does not apply.

**1. QUALITY OF SERVICE**

|  |  |  |
| --- | --- | --- |
|  | **Rating** | **Definition** |
| **☐** | **Exceptional** | Performance meets contractual requirements and exceeds many to the Government’s/our organization’s benefit. The contractual performance was accomplished with few minor problems for which corrective actions taken by the contractor were highly effective. |
| **☐** | **Very Good** | Performance meets contractual requirements and exceeds some to the Government’s/our organization’s benefit. The contractual performance being evaluated was accomplished with some minor problems for which corrective actions taken by the contractor were effective. |
| **☐** | **Satisfactory** | Performance meets contractual requirements. The contractual performance contains some minor problems for which corrective actions taken by the contractor appear or were satisfactory. |
| **☐** | **Marginal** | Performance does not meet some contractual requirements. The contractual performance being evaluated reflects a serious problem for which the contractor has not yet identified corrective actions. The contractor’s proposed actions appear only marginally effective or were not fully implemented. |
| **☐** | **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. |
| **☐** | **Not Applicable** |  |

**ADDITIONAL COMMENTS:**

|  |
| --- |
| Click here to enter text. |

**2. SCHEDULE**

|  |  |  |
| --- | --- | --- |
|  | **Rating** | **Definition** |
| **☐** | **Exceptional** | Performance meets contractual requirements and exceeds many to the Government’s/our organization’s benefit. The contractual performance was accomplished with few minor problems for which corrective actions taken by the contractor were highly effective. |
| **☐** | **Very Good** | Performance meets contractual requirements and exceeds some to the Government’s/our organization’s benefit. The contractual performance being evaluated was accomplished with some minor problems for which corrective actions taken by the contractor were effective. |
| **☐** | **Satisfactory** | Performance meets contractual requirements. The contractual performance contains some minor problems for which corrective actions taken by the contractor appear or were satisfactory. |
| **☐** | **Marginal** | Performance does not meet some contractual requirements. The contractual performance being evaluated reflects a serious problem for which the contractor has not yet identified corrective actions. The contractor’s proposed actions appear only marginally effective or were not fully implemented. |
| **☐** | **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. |
| **☐** | **Not Applicable** |  |

**ADDITIONAL COMMENTS:**

|  |
| --- |
| Click here to enter text. |

**3. COST CONTROL**

|  | **Rating** | **Definition** |
| --- | --- | --- |
| **☐** | **Exceptional** | Performance meets contractual requirements and exceeds many to the Government’s/our organization’s benefit. The contractual performance was accomplished with few minor problems for which corrective actions taken by the contractor were highly effective. |
| **☐** | **Very Good** | Performance meets contractual requirements and exceeds some to the Government’s/our organization’s benefit. The contractual performance being evaluated was accomplished with some minor problems for which corrective actions taken by the contractor were effective. |
| **☐** | **Satisfactory** | Performance meets contractual requirements. The contractual performance contains some minor problems for which corrective actions taken by the contractor appear or were satisfactory. |
| **☐** | **Marginal** | Performance does not meet some contractual requirements. The contractual performance being evaluated reflects a serious problem for which the contractor has not yet identified corrective actions. The contractor’s proposed actions appear only marginally effective or were not fully implemented. |
| **☐** | **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. |
| **☐** | **Not Applicable** |  |

**ADDITIONAL COMMENTS:**

|  |
| --- |
| Click here to enter text. |

**4. BUSINESS RELATIONS**

|  | **Rating** | **Definition** |
| --- | --- | --- |
| **☐** | **Exceptional** | Performance meets contractual requirements and exceeds many to the Government’s/our organization’s benefit. The contractual performance was accomplished with few minor problems for which corrective actions taken by the contractor were highly effective. |
| **☐** | **Very Good** | Performance meets contractual requirements and exceeds some to the Government’s/our organization’s benefit. The contractual performance being evaluated was accomplished with some minor problems for which corrective actions taken by the contractor were effective. |
| **☐** | **Satisfactory** | Performance meets contractual requirements. The contractual performance contains some minor problems for which corrective actions taken by the contractor appear or were satisfactory. |
| **☐** | **Marginal** | Performance does not meet some contractual requirements. The contractual performance being evaluated reflects a serious problem for which the contractor has not yet identified corrective actions. The contractor’s proposed actions appear only marginally effective or were not fully implemented. |
| **☐** | **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. |
| **☐** | **Not Applicable** |  |

**ADDITIONAL COMMENTS:**

|  |
| --- |
| Click here to enter text. |

**5. MANAGEMENT OF KEY PERSONNEL**

|  | **Rating** | **Definition** |
| --- | --- | --- |
| **☐** | **Exceptional** | Performance meets contractual requirements and exceeds many to the Government’s/our organization’s benefit. The contractual performance was accomplished with few minor problems for which corrective actions taken by the contractor were highly effective. |
| **☐** | **Very Good** | Performance meets contractual requirements and exceeds some to the Government’s/our organization’s benefit. The contractual performance being evaluated was accomplished with some minor problems for which corrective actions taken by the contractor were effective. |
| **☐** | **Satisfactory** | Performance meets contractual requirements. The contractual performance contains some minor problems for which corrective actions taken by the contractor appear or were satisfactory. |
| **☐** | **Marginal** | Performance does not meet some contractual requirements. The contractual performance being evaluated reflects a serious problem for which the contractor has not yet identified corrective actions. The contractor’s proposed actions appear only marginally effective or were not fully implemented. |
| **☐** | **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. |
| **☐** | **Not Applicable** |  |

**ADDITIONAL COMMENTS:**

|  |
| --- |
| Click here to enter text. |

**SECTION 5: PAST PERFORMANCE SUMMARY**

(To be completed by the Client POC)

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Provide an overall rating for the Contractor using the evaluation rating scale below.   |  |  |  | | --- | --- | --- | |  | **Rating** | **Definition** | | **☐** | **Exceptional** | Performance meets contractual requirements and exceeds many to the Government’s/our organization’s benefit. The contractual performance was accomplished with few minor problems for which corrective actions taken by the contractor were highly effective. | | **☐** | **Very Good** | Performance meets contractual requirements and exceeds some to the Government’s/our organization’s benefit. The contractual performance being evaluated was accomplished with some minor problems for which corrective actions taken by the contractor were effective. | | **☐** | **Satisfactory** | Performance meets contractual requirements. The contractual performance contains some minor problems for which corrective actions taken by the contractor appear or were satisfactory. | | **☐** | **Marginal** | Performance does not meet some contractual requirements. The contractual performance being evaluated reflects a serious problem for which the contractor has not yet identified corrective actions. The contractor’s proposed actions appear only marginally effective or were not fully implemented. | | **☐** | **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. | |
| On a scale of 1 to 5, how likely would you be to use the Contractor again?  1 2 3 4 5  Not at Slightly Moderately Very Extremely  all Likely Likely Likely Likely Likely |
| If you have any further information that was not covered by this questionnaire, but you feel is important, please provide this information |
|  |
|  |
|  |
|  |
|  |
|  |

|  |  |  |
| --- | --- | --- |
| Client POC’s Signature |  | Date |
|  |  |  |

|  |  |
| --- | --- |
| **Please return a scanned copy to:** | XYZ |

1. Past Performance Rating must be provided by a Contracting Officer, Contracting Officer’s Representative, Contracting Officer’s Technical Representative or Corporate Officer/Official with knowledge about the project [↑](#footnote-ref-2)