

## **SECTION L INSTRUCTIONS TO OFFERORS**

### **1.0 Program Structure and Objective**

The Government plans to award a multiple award indefinite delivery/indefinite quantity (ID/IQ) contract for the CFT program. Award will be made on the basis of best value utilizing Tradeoff Source Selection Procedures. Award will be made to the contractors that provide the best value to the Government over the entire period of performance.

CFT will primarily include an awarded set of Contractor maintenance personnel who are provided with Government-furnished special tools, equipment, workspace and supplies to accomplish modification/maintenance/repair effort on-site at operational Government locations, both in the Continental United States (CONUS) and outside the CONUS (OCONUS). The CFT Program accomplishes depot, field and organizational level inspection, maintenance, modification and repair at operational Government locations worldwide. The program supports requirements for the Active Air Force, Air National Guard and Air Force Reserve components. CFT contracts are also used to support requirements generated by the Army, Navy, Marines, Coast Guard, Federal Aviation Administration (FAA), Department of Homeland Defense and other federal agencies. The CFT Program provides a rapid deployment workforce augmentation capability to field necessary skilled technicians on site anywhere in the world to support the Government's war readiness needs.

This solicitation is subject to a Partial Set-Aside of task orders that the Government estimates will require the contractor to provide up to 100 full-time equivalents (FTEs) of personnel per task order in the CONUS. Only qualifying small businesses will be eligible to compete for set-aside task orders. Task orders larger than the partial set-aside will be available for competition among contractors (large or small) who successfully compete under the non-set-aside portion of this solicitation for the Full and Open Competition Pool

Small Business Choice of Competition. Small Business offerors shall clearly indicate the pool(s) in which they intend to compete on the front page of the RFP. Small businesses may elect to compete in either or both competition pool(s). If a small business elects to compete in the full and open pool, they must submit a separate proposal, to include all volumes, for the Full & Open Competition Pool and meet all of the criteria for that pool to be eligible for award

### **1.1. Budget/Funding Information**

Funding will be obligated on each task order awarded under the basic contracts. Orders may be fully or incrementally funded as appropriate.

### **2.0 General Instructions**

2.0.1. This section of the Instructions to Offerors (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. Any Offeror who submits an incomplete package may be considered ineligible for award. The offer shall be compliant with the requirements as stated in the Performance Work Statement (PWS) and appendices. Non-

conformance with the instructions provided in the ITO may result in an unfavorable proposal evaluation.

2.0.2. 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.

2.0.3. Elaborate brochures, documentation, binding, detailed artwork, or other embellishments are unnecessary and are not desired.

2.0.4. 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 until this date.

2.0.5. In accordance with FAR Subpart 4.8 (Government Contract Files), the Government will retain one copy of all unsuccessful proposals.

2.0.6 All or parts of the Offeror's Technical proposal may be added to the contract. Should there be any discrepancies between the technical proposal and the Performance Work Statement (PWS), the PWS will take precedence.

## **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.

### **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 or FAR 15.506. 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 accordance with FAR 15.503. 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. The Offeror is reminded that the Government reserves the right to award this

effort based on the initial proposal, as received, without discussions. 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 System for Award Management (SAM) website at <https://sam.gov>. Potential offerors are encouraged to subscribe for real-time e-mail notifications when information has been posted to the website for this solicitation.

#### 2.1.5. Amendments to Solicitation

If this RFP is amended, all terms and conditions that are not amended remain unchanged and in full force and effect. Offerors shall acknowledge receipt of any amendment and provide confirmation upon submission of the Offeror's proposal. Any unacknowledged amendments in the Offeror's proposal are subject to solicitation provision FAR 52.215-1(b).

#### 2.1.6. Submission, Modification, Revision, and Withdrawal of Proposals

Proposals and modifications to proposals shall be submitted via drop-off (upload) files in DoD SAFE to Contracting Officer at [jennifer.russ@us.af.mil](mailto:jennifer.russ@us.af.mil)

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

### 2.2.1. Title Pages

The Title Page of each volume must show solicitation number, name, address, and telephone number(s) of the Offeror and e-mail address if available.

### 2.2.2. Team List

A Team List of the Offeror's primary Point of Contacts shall be submitted electronically.

### 2.2.3. Proposal Organization Table

The Offeror shall prepare the proposal as set forth in the Proposal Organization Table (Table 2.3 below). 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 2.3. The contents of each proposal volume are described in the ITO paragraph as noted in the table below.

Table 2.3. Proposal Organization

Volume	ITO Paragraph Number	Volume Title	Page Limit
<b>I</b>	3.1	Narrative Summary	5
	3.2	Master Table of Contents	Unlimited
<b>II</b>	<b>3.0</b>	<b>Technical</b>	<b>75</b>
	2.2.1	Title Page (Not included in 75-page limit)	1
	2.2.2	Team List (see Attach 2.1) (Not included in 75-page limit)	5
	2.2.3	Proposal Organization Table	Unlimited
	2.3.8	List of Tables and Figures	Unlimited
	2.3.9	Glossary of Abbreviations and Acronyms	Unlimited

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		Cross reference Matrix (See Attach 2.2) (Not included in the 75-page limit)	2
	3.2.3	Subfactor 1, Program Management	*
	3.2.4	Subfactor 2, Resource Management	*
	3.2.5	Subfactor 3, Quality Management	*
	3.2.6	Subfactor 4, Small Business Subcontracting	*
<b>III</b>	<b>4.0</b>	<b>Past Performance</b>	<b>Unlimited</b>
	2.2.1	Title Page (Not included in 75-page limit)	1
	2.2.2	Team List (see Attach 2.1) (Not included in 75-page limit)	5
	2.2.3	Proposal Organization Table	Unlimited
	2.3.8	List of Tables and Figures	Unlimited
	2.3.9	Glossary of Abbreviations and Acronyms	Unlimited
	4.3/4.3.1	Past Performance Information Forms (PPIF) (See Attach 1.1)	Target 5 pages per contract
	4.1.2	Consent Letter (See Attach 1.4)	Unlimited
	4.1.3	Client Authorization Letters (See Attach 1.5)	Unlimited
	4.1.4	Commitment to Perform as Proposed (See Attach 1.6)	Unlimited
	4.2.2	Present/Past Performance Questionnaires (See Attach 1.2)	Tab Only
	4.3.1/4.3.2	Relevant Contract Narrative and Contractor Information IAW PPI Tool (See Attach 1.1)	Request Max 5 pages per contract
	4.3.4	Roadmap	2
<b>III</b>	<b>5</b>	<b>Price Volume</b>	<b>Unlimited</b>
	2.2.1	Title Page (Not included in 75-page limit)	1
	2.2.2	Team List (see Attach 2.1) (Not included in 75-page limit)	Unlimited
	2.2.3	Proposal Organization Table	Unlimited
	2.3.8	List of Tables and Figures	Unlimited
	5.2	General Information	Unlimited
<b>IV</b>	<b>6.0</b>	<b>Contract Documentation</b>	<b>Unlimited</b>
	2.2.1	Title Page (Not included in 75-page limit)	1
	2.2.2	Team List (see Attach 2.1) (Not included in 75-page limit)	5
	2.2.3	Proposal Organization Table	Unlimited
	2.3.8	List of Tables and Figures	Unlimited
	2.3.9	Glossary of Abbreviations and Acronyms	Unlimited
	6.1	Model Contract (Sections A-J)	N/A
	6.1.6	Representations and Certifications (Section K)	Unlimited
	6.2	Exceptions to Solicitation Requirements	Unlimited
	6.3.2	Authorized Offeror Personnel/Contract Information	Unlimited

\* The page limit for the entire technical volume is 75 for all subfactors.

## 2.2.4. Page Limitations

Page limitations shall be treated as maximums. If exceeded, the excess pages will not be considered in the evaluation of the proposal. Page limitations may also 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: blank pages, title pages, tables of contents, tabs, indexes, glossaries, and those noted in the Proposed Organization Chart as unlimited.

### **2.2.5. Pricing Information**

All pricing information shall be addressed ONLY in the 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.

### **2.2.6. Cross Referencing**

The Technical volume shall be written on a stand-alone basis so that its contents may be evaluated without cross-referencing to other volumes of the proposal. Information required for the technical proposal evaluation, which is not found the Technical volume, will be assumed to have been omitted from the proposal, and will not be considered in the technical evaluation. Cross-referencing within a proposal volume is permitted when its use would conserve space without impairing clarity. The Past Performance and Price evaluation will utilize information from each's respective volume for the evaluation but may also utilize information from other volumes as well.

### **2.3.7. Table of Contents**

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.

### **2.3.8. Tables and Figures**

The Offeror's proposal shall include an indexed list of Tables and Figures.

### **2.3.9. 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.

## **2.4. Page Size and Format**

2.4.1. 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. Page line spacing shall be 1.5 lines. Except for the reproduced sections of the solicitation document, the text size shall be no less than Arial 12 points. Offerors are prohibited from using other Arial fonts such as Arial Black, Arial Narrow or Arial Rounded MT Bold. 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 3/4-inch side margins. Pages shall be numbered sequentially by volume. These page format restrictions shall apply to responses to Evaluation Notice (ENs). These limitations shall apply to electronic proposals.

2.4.2. 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 and shall not exceed 11 x 17 inches in size and may only be used for large tables, charts, graphs, diagrams, and schematics: not for pages of text. The following limitation only applies to the Technical Volume. Text intended for evaluation within all figures, charts,

tables, and graphs, to include imbedded images, shall be no less than Arial 8-pt. These limitations shall apply to both electronic and hard copy proposals. Any text within figures, charts, tables, and graphs which do not meet this requirement will not be considered in the evaluation. These limitations shall apply to electronic proposals.

## **2.5. Electronic Offers**

All proposals shall be submitted using DoD SAFE, <https://safe.apps.mil/>. All interested offerors must e-mail Jennifer Russ at [jennifer.russ@us.af.mil](mailto:jennifer.russ@us.af.mil) and [jack.smies@us.af.mil](mailto:jack.smies@us.af.mil) in order to receive a request code to drop-off (upload) files in DoD SAFE. One of the Government Point of Contact (GPOC)s will send an e-mail to the offeror acknowledging the request for a proposal drop-off code in DoD Safe. The GPOC e-mail acknowledging the request will not be sent to the offeror after close of business hours, weekends, or on nationally observed holidays. If you do not receive an acknowledgement e-mail from either of the GPOCs after 72 hours, you must send another e-mail. E-mails will not be returned after close of business hours, weekends, or on nationally observed holidays.

After the e-mail request for a drop-off code has been sent from the offeror and the offeror has received the acknowledgment e-mail from either GPOC, the offeror will then receive an e-mail from DoD SAFE to drop-off proposals and other requested documents. If the offeror does not receive the e-mail from DoD SAFE the offeror will need to check SPAM and JUNK folders before requesting another drop-off code from the GPOC.

The request for drop-off is only valid for 14 days. If the 14 days has expired and the RFP is still open, the offeror may send another e-mail request for drop-off code to the GPOCs e-mail addresses listed above. Be advised that classified information is not allowed on DoD SAFE. Any files containing CUI/PII/PHI must be encrypted prior to uploading or by checking the "Encrypt every file" box. The offeror is allowed to drop-off one or more files (up to 8GB total). The offeror may select the box 'Send me an e-mail when each recipient picks up the files' for documentation purposes. The GPOC will receive an automated e-mail containing the information the offeror has entered and instructions for downloading the file(s). The GPOC will have 7 days to retrieve the files submitted in the drop-off. DoD SAFE does not guarantee delivery of documents within a specified time period under 4 hours.

All electronic documents and files submitted shall contain the volume number and title. Use separate files to permit rapid location of all portions, including subfactors, required plans, exhibits, appendices, and attachments, if any. The Offeror shall submit volumes I through IV in electronic format. Each volume shall be submitted as a separate file. The electronic copies of the proposal shall be submitted in a format readable by Microsoft (MS) Word 365, MS Excel 365, MS-Power Point 365, and Adobe PDF. Note PDF files must be searchable and able to copy and paste. For amendment purposes to the proposal, the "original" proposal shall be clearly identified.

## **2.6. Distribution**

2.6.1 Once the Offeror has uploaded the Offeror's proposal in its entirety to DoD SAFE, the Offeror shall take a screen shot (Print Screen function) of the Offeror's DoD SAFE upload confirmation screen showing all the uploaded files included in the proposal submission. The

Offeror shall notify both Jennifer Russ (CO) and Jack Smies (Program Manager) by email that the files have been uploaded and provide a copy of the DoD SAFE completed upload confirmation screen shot. If the proposal files are uploaded in their entirety prior to the proposal closing date and time, and the Offeror has notified both Jennifer Russ and Jack Smies the files have been uploaded (notification is to include the DoD SAFE upload confirmation screen shot has also been provided), the proposal will be considered timely, even if the files are not accessible to the CO in DoD SAFE until after the proposal closing date and time. If the Offeror fails to notify both Jennifer Russ and Jack Smies by email, the files will be considered timely if they are accessible in DoD SAFE prior to the closing date and time. However, they will be considered late proposals, if they are not accessible until after the proposal date and time.

Email addresses are as follows:

Jennifer Russ: [jennifer.russ@us.af.mil](mailto:jennifer.russ@us.af.mil)

Jack Smies: [jack.smies@us.af.mil](mailto:jack.smies@us.af.mil)

### **3.0 Volume I**

#### **3.1 Narrative Summary**

The Offeror shall provide a concise narrative summary of the entire proposal, 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**

A master table of contents of the entire proposal.

### **3.0 Factor 1 – Technical**

#### **3.1. General**

The Technical Volume should be specific and complete. Legibility, clarity and coherence are very important. Your responses will be evaluated against the Technical 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. Offerors shall assume that the government has no prior knowledge of their experience or facilities and will base its evaluation on the information presented in the proposal. 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 neither necessary nor desirable for you to tell us so in your proposal. Do not merely reiterate the objectives or reformulate the requirements specified in the solicitation.

#### **3.2. Format and Specific Content**

##### **3.2.1. Technical**

In the Technical Volume, address your proposed approach to meeting the minimum performance or capability requirements of each technical subfactor.

##### **3.2.2. Volume Organization**

The Technical Volume shall be organized according to the following general outline:

- (1) Team List Attach 2.0
- (2) Table of Contents
- (3) List of Table and Drawings
- (4) Glossary
- (5) Subfactor One – Program Management
- (6) Subfactor Two – Resource Management
- (7) Subfactor Three – Quality Management
- (8) Subfactor Four – Small Business Subcontracting

### **3.2.3. Subfactor 1: Program Management**

The Offeror shall provide an approach for Program Management. As a minimum, the approach shall provide the following essential elements:

- a. An approach to identify and resolve anticipated difficulties associated with the transition of existing orders to/from another service provider and stand-up of a new CFT site. The approach must describe strategies to minimize disruption during the transition period while maintaining cost and schedule. (PWS 4.3.1).
- b. The approach must describe how the Offeror's team shall perform the roles and responsibilities associated with CFT program management requirements, to include management capability in major weapons systems maintenance/ modification/repair. The approach must also describe how the Offeror will establish a contractor management structure by contract award, perform tasks, submit deliverables, and resolve issues and discrepancies. (PWS 2.0, 4.1).
- c. The approach must describe the Offeror's plan to manage multiple requirements or teams, to include the transition of multiple sites concurrently. (PWS 2.0, 4.1 & 4.2) Offerors responding to only the Small Business Set-Aside portion should respond to (i), below. Offerors responding to only the Full & Open (non-set-aside) portion should respond to (ii) below. Offerors responding to both the set-aside and the non-set-aside portions should respond to (i) in the Small Business Set- Aside Competition Pool proposal and (ii) in the Full & Open Competition Pool proposal.
  - i. (Small Business Set-Aside Competition Pool) The Offeror must demonstrate their capacity to transition and manage multiple requirements or teams at multiple locations concurrently (both CONUS and OCONUS) and explain how it will meet the requirements of PWS 2.0, 4.1, and 4.2. At a minimum, the Offeror should demonstrate it has a viable plan to manage two or more requirements or teams concurrently totaling 100 FTEs, with at least one example from a CONUS location and at least one example from an OCONUS location. NOTE: For example, the Offeror could demonstrate its approach to performing multiple requirements with a team that could be up to 50 CONUS on one requirement, up to 20 CONUS on another requirement, up to 30 OCONUS on another requirement, etc. These examples are not indicative of all possible CFT team sizes needed at any given time or location.



- ii. (Full & Open Competition Pool) The Offeror must demonstrate their capacity to transition and manage multiple requirements or teams at multiple locations concurrently and explain how it will meet the requirements of PWS 2.0, 4.1, and 4.2. At a minimum, the Offeror should demonstrate it has a viable plan to manage two or more requirements or teams concurrently totaling 1200 FTEs, with at least one example from a CONUS location and at least one example from an OCONUS location. NOTE: For example, the Offeror could demonstrate its approach to performing multiple requirements with a team that could be up to 700 OCONUS on a requirement, up to 300 CONUS on another requirement, up to 200 CONUS on another requirement, etc. These examples are not indicative of all possible CFT team sizes needed at any given time or location.
- d. An approach that clearly describes the capability to track, monitor, manage, control and audit task order cost down to the Contract Line-Item Number (CLIN) & sub-CLIN level. (PWS 4.1.1).
- e. An organizational approach and management structure, i.e., organizational chart. The response must describe how the Offeror's team is organized to coordinate activities among team members, including, if applicable, mentor/protégé and joint venture partners. An organizational chart with the proposed management structure to include the names and locations of the prime Contractor, core team members, subcontractors, and if applicable, mentor/protégé and joint venture partners shall be included. The approach shall also describe processes for clear lines of communication with delegated authority, monitoring team performance, resolving team conflict/personnel issues, accomplishing tasks in a timely manner, and submission of deliverables and prompt resolution of task issues and discrepancies. If teaming and/or sub-contracting, the approach must clearly describe how each team member will perform their respective maintenance areas associated with the CFT maintenance scope in PWS 2.0. In addition, the approach must effectively describe how the Offeror will coordinate all contract activities associated with the CFT maintenance effort amongst any associated sub- contractor or teaming partners (PWS 2.0 & 4.1).
- f. An approach for establishing and enforcing safe and effective written Flight and Ground (including Safety) Procedures IAW DCMAI 8210.1C. The proposed approach must include a sample set of "core procedures" (addressing items 4.1, 4.2, 4.8, 5.2, 5.3, 5.4, 5.5, 5.9, 5.14, 5.26, 5.29, 5.30 and 6.1) illustrating how operations are uniform throughout multiple locations. Additionally, the approach must describe separate and distinct written instructions that delineate the processes personnel shall follow while conducting operations regarding aircraft subjects (i.e. towing), by task order, to the requirements of DCMAI 8210.1C. Any references to additional company procedures or operating instructions to fulfill requirements must be included in the approach. (PWS 4.7).

### **3.2.4. Subfactor 2: Resource Management**

The Offeror shall provide an approach for Resource Management. As a minimum, the approach shall provide the following essential components:

- a. A process for obtaining and retaining qualified personnel and a plan for how this process will be utilized in support of this effort. As a minimum, the process shall include a detailed description of recruitment, hiring, turnover and downsizing processes, in both relocation and surge conditions. The process shall also describe personnel qualifications/certification processes, retention policies, and the number currently employed/available by skill classification. (PWS 4.2).
- b. An approach that describes the process for rapid response requirements at both CONUS and OCONUS locations. (PWS 4.2) As a minimum, the approach must describe how the Offeror responds to task order solicitations within a minimum of 72 hrs., when the requirement dictates, as well as an approach for timely availability of appropriate personnel to meet accelerated delivery schedules or surge requirements at both CONUS and OCONUS locations.
- c. A security clearance process describing the mix of skills and clearance levels necessary to accomplish the CFT mission. The process must address the number of current employees who hold security clearances and the level of each security clearance. The process must also address how tasks will be supported until required clearances are obtained, should personnel with a required clearance not be available. (PWS 5.2).

### **3.2.5. Subfactor 3: Quality Management**

The Offeror shall provide an approach for Quality Management. This approach must address the Offeror's quality management plan and overall approach to quality assurance of CFT requirements. As a minimum, the approach shall provide the following essential elements:

- a. Quality Management System (QMS). The QMS must address the Offeror's quality management plan and overall approach to quality assurance of CFT requirements. Specifically, the QMS procedures shall be written to encompass the requirements of the CFT Program and be available for review/audit at the time of Basic contract award. The procedures must address how the Offeror's quality management plan is compliant with AS9100D supported by verifiable objective evidence. (PWS 4.6.3).
- b. Standard Operating Procedures/Local Operating Instructions (SOPs/LOIs) as required. (PWS 4.6) Specifically, Offerors must address how the SOPs are compliant with AS9100 which include quality procedures for the following AS9100D clauses:
  - i. QMS processes as defined in AS9100 Clause 4 (quality manual, control of documents/records);
  - ii. Management responsibility as defined in AS9100 Clause 5 (management commitment, customer focus, quality policy, quality planning);

- iii. Resource management as defined in AS9100 Clause 6 (provisions for resources, human resources, infrastructure, work environment);
  - iv. Product realization as defined in AS9100 Clause 7 (planning, customer-related processes, design and development [if applicable], purchasing, production and service provision, control of monitoring and measuring equipment, configuration management);
  - v. Measurement, analysis and improvement as defined in AS9100 Clause 8 (monitoring and measurement, control of nonconforming product, analysis of data, improvement).
- c. A quality management approach based on AS9100D clauses 4-8 that can be implemented, through SOPs and LOIs as required, at the site level. An effective quality management approach that describes how the QMS clauses above will be implemented at the site level. The approach must address the development and submission of Local Operating Instructions (LOIs) when local process(es) at a site either deviate from the SOPs or the SOPs do not adequately address the process(es). The Offeror must address circumstances which would dictate the generation of site specific LOIs. (PWS 4.3.2.1).

#### **3.2.6. Subfactor 4: Small Business Subcontracting**

The Offeror shall provide an approach for Small Business Subcontracting on CFT task order requirements. As a minimum, the approach shall provide the following essential elements:

- a. Provide a Small Business Subcontracting Plan that adequately responds to each of the requirement elements of FAR clause 52.219-9(d) paragraphs (1) through (11) and DFARS clause 252.219-7003 (or DFARS 252.219-7004 if the offeror has a comprehensive subcontracting plan) and a Small Business Subcontracting Plan reflective of and consistent with the commitments offered in the Small Business Participation Plan. Identify the percentage of total subcontracted dollars to be performed with each of the following small business socioeconomic categories: Small Disadvantaged, Women-Owned, HUBZone, and Service-Disabled Veteran-Owned. Successful Offerors' Small Business Subcontracting Plans will be incorporated in each applicable Contractor's CFT ID/IQ contract. (PWS 4.6) (Applicable to large businesses only).
- b. Separate from the Small Business Subcontracting Plan, all businesses both large and small (including those with large businesses with master subcontracting plans, individual subcontracting plans, commercial subcontracting plans or comprehensive subcontracting plans) shall provide a Small Business Participation Plan which includes the following:
  - i. The extent to which small businesses are specifically identified in proposals.

- ii. The extent of commitment to use such small businesses (which may include or be only the Offeror itself if it is a small business)
- iii. The complexity and variety of the work small businesses are to perform.
- iv. The extent of participation of such small businesses as a percentage and dollar value of total contract dollars (including the percentage of total contract dollars to be performed by each type of subcategory small business (Small Disadvantaged, Women-Owned, HUBZone, and Service- Disabled Veteran-Owned)). If the prime offeror is a small business, they should include the dollar and percentage they will self-perform (SB are not required to use any additional small business participation). The percentage of work performed by a small business that qualifies in multiple small business socioeconomic subcategories may be counted in each subcategory. (Applicable to both large and small businesses.)

#### **4.0. Factor 2 – Past Performance**

##### **4.1. General**

4.1.1. Each offeror shall submit a past performance volume with its proposal, containing past performance information in accordance with the format contained in Attachment 1.1 of the ITO. The Past Performance volume shall include a team list, which includes the prime contractor, all significant subcontractors, teaming partners, and/or joint venture partners proposed to perform the work outlined in the solicitation. The Offeror shall describe the portion of effort each team member is proposed to perform in relation to the Factor 1 Technical subfactors, Factor 3 Price, and Scope, Magnitude and Complexity. The Government Past Performance Evaluation Team (PPET) evaluates each member of the Offeror's team for relevancy and performance quality, based on their proposed portion of effort. Therefore, it is important for the Offeror to provide a detailed portion of effort description, in order for the PPET to conduct an accurate assessment. Offerors shall also provide approximate percentages for portion of effort for each team member. For the Past Performance evaluation, the Government will use data provided by the Offeror in the Past Performance volume, as well as data obtained from other sources.

4.1.2. Attachment 1.4 Consent Letter. This letter shall be executed and signed by each subcontractor, teaming partner, and/or joint venture partner. The letter authorizes the release of adverse past performance information to the Offeror so the Offeror can respond to such information.

4.1.3 Attachment 1.5 Client Authorization Letter. For each identified effort for a commercial customer, the Offeror shall submit a client authorization letter (Attachment 1.5) authorizing release to the Government of requested information on the Offeror's performance.

4.1.4 Attachment 1.6 Commitment to Perform as Proposed Letter. This letter shall be executed and signed by the Prime contractor and each Subcontractor. The letter states that, in the event a contract is awarded to the Prime Contractor, the Prime Contractor and Subcontractor (to include teaming partners, and/or joint venture partners) commit to joint contract performance as described in the proposal. A separate letter shall be completed for each subcontractor

separately. If the signed commitment is not fully executed by both parties and provided with the Past Performance Proposal, the subcontractor references will not be evaluated or considered. In the even the signed letter is not submitted with the initial proposal, but is later submitted during the evaluation, the subcontractor references will be considered at that point.

## **4.2. Early Proposal Information**

4.2.1 Each offeror is requested to submit the Past Performance volume fifteen (15) calendar days prior to the solicitation closing date. The Past Performance volume early proposal information is a request, and not a requirement. Failure to submit early proposal information will not result in offeror disqualification, nor will offerors be penalized.

4.2.2. As soon as practicable, offerors shall complete Section 1 of the attached Past Performance Questionnaire (Attachment 1.2) and e-mail it and the Performance Questionnaire Letter (Attachment 1.3) to all points of contacts (POCs) the Offeror has listed in the Past Performance Information Form (Attachment 1.1). The POCs will complete the questionnaires and forward them directly to the Past Performance Evaluation Team (PPET). (Attn: Jennifer Russ). Email address for questionnaires is [jennifer.russ@us.af.mil](mailto:jennifer.russ@us.af.mil). RESPONDENTS TO THE QUESTIONNAIRES SHALL NOT SEND THE COMPLETED INFORMATION SHEETS BACK TO THE OFFEROR. Offerors shall not follow-up with respondents to ensure they have completed the questionnaires. The PPET will conduct such follow-up with any POC as necessary.

## **4.3. Relevant Contracts**

4.3.1. The Offeror shall provide Past Performance Information (PPI) on current or previous contracts (or efforts). The PPI shall be completed in accordance with Attachment 1.1, Past Performance Information Form (identified in this document as “PPIF”). The Offeror shall submit PPIFs for contracts which include all or some performance within the past three years, as defined in Section M, para 2.4.2.1 Recency Assessment. Request each offeror submit up to three (3) PPIFs for the prime contractor, and up to three (3) PPIFs for each significant subcontractor/teaming partner. Significant subcontractor is defined as a contractor who is proposed to perform over 5% of the total effort, or a contractor who is proposed to perform less than 5% of the total effort but is determined to be performing a critical function. NOTE: The requested number of PPIFs for the prime and subcontractors are preferences and not requirements. Offerors may submit more than the preferred number if the Offeror believes the extra contracts are needed to fully describe their relevancy. Offerors who submit less than the preferred number of PPIFs are not automatically assigned a “Neutral Confidence” rating. Fewer numbers may be acceptable, if the Government determines there is sufficient information to determine a confidence rating. Request each PPIF not exceed a target of 5 pages, although more or less may be submitted, if necessary and relevant to the CFT program.

### **4.3.2. PPI Relevant Contract Narrative**

For each PPIF, the Offeror shall provide a narrative explaining what aspects of the contract is deemed relevant to the proposed effort, and to what aspects of the proposed effort they relate. Specifically, the narrative should focus on similarities to the Factor 1 Technical subfactors, Factor 3 Price, and Scope, Magnitude, and Complexity, as defined in Section M, paragraph 2.4.2.2, and should be tailored to the proposed portion of effort. Categorize the relevant information into the specific technical subfactors and price assessment used to evaluate the proposal. The narrative 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 shall 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. The Offeror is requested to limit the narrative to a maximum of 5 pages. However, the Offeror may exceed the requested page limit, if determined necessary to fully describe relevancy.

4.3.3. Affiliate companies, sister companies, teaming arrangements, joint venture agreement, etc., will be considered, provided that sufficient documentation is included in the proposal. The Prime contractor must demonstrate that the affiliate will perform significant and critical aspects of the contract if awarded. Proposal documentation should include a copy of the signed arrangement such as documented affiliation, a copy of the teaming agreement, a copy of the joint venture agreement, etc. If the required information is not included in the proposal, the proposed affiliate companies, sister companies, joint venture companies, etc. not be evaluated or considered.

#### **4.3.4. 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 the 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, offeror's shall include a "roadmap" describing all such changes in the organization of the offeror's 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), the "roadmap" should be both specifically applicable to the efforts identified, yet general enough to apply to efforts on which the Government receives information from other sources.

### **5.0. Factor 3 – Price**

**\*THIS WILL BE UPDATED BY AN RFP AMENDMENT WHEN AVAILABLE**

## **6.0. Contract Documentation**

### **6.1. 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 J.

**6.1.1. Solicitation/Contract Form (Section A)**

Complete blocks 12, 13, 14, 15 and sign and date block 27 of the Standard Form 1447, Solicitation/Contract (SF1447). A wet signature by the Offeror on the SF1447 constitutes an offer, which the Government may accept.

**6.1.2. Supplies or Services and Costs/Prices (Section B)**

Offerors shall complete the pricing spreadsheet entitled, "Labor Category Rate Matrix" (RFP/Contract Section J, Attachment 2). The rates established in the Labor Category Rate Matrix will correlate to the appropriate CLIN listed in Section B. The Offeror shall not complete Section B, but refer to Section 6 above for instructions for completing the price matrices. The contract clauses pertinent to this section and that are required to be filled-in will be completed on each individual task order.

**6.1.3. Section H - Special Contract Requirements**

All Unique Contract Requirements are described in the special clauses in Section H of the RFP. The Offeror shall provide required information to complete special clauses as required.

**6.1.4. Contract Clauses (Section I)**

All other contract clauses are listed in Section I of the RFP. The Offeror shall provide required information to complete clauses as required.

**6.1.5. Representations, Certifications, and other Statements of Offerors (Section K)**

The offeror has completed the annual representations and certification electronically via the System for Award Management (SAM) website at <https://www.sam.gov>. After reviewing the SAM database information, the offeror verifies by submission of this offer that the representation and certifications currently posted electronically at FAR 52.212-3, Offeror Representations and Certifications—Commercial Items are correct.

**6.2. 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 6.2. Offerors are cautioned the Government could determine any identified exceptions to be unacceptable, which would make the proposal ineligible for award.

Table 6.2 - Solicitation Exceptions

<i><b>Solicitation Document</b></i>	<i><b>Page/ Paragraph</b></i>	<i><b>Requirement/ Portion</b></i>	<i><b>Rationale</b></i>
-------------------------------------	-------------------------------	------------------------------------	-------------------------

<i>PWS, Model Contract, ITO Attachments, etc.</i>	<i>Applicable Page and Paragraph Numbers</i>	<i>Identify the requirement or portion to which exception is taken</i>	<i>Describe why the requirement can/will not be met</i>
---	--	--	---

### **6.3. Other Information Required**

#### **6.3.1. Ombudsman**

An Ombudsman has been appointed to hear concerns from Offerors or potential Offerors during the proposal development phase of this acquisition. The Ombudsman for this acquisition is AFSC/PZC, located at Tinker AFB. This does not diminish the authority of the program director or CO, but communicates Offeror concerns, issues, disagreements, and recommendations to the appropriate Government personnel. When requested, the Ombudsman shall maintain strict confidentiality as to the source of the concern. The Ombudsman does not participate in the evaluation of proposals or in the source selection process; interested parties are invited to call AFSC/PZC at 405-736-3273.

#### **6.3.2. 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.

#### **6.3.3. 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).

#### **6.3.4. 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.

#### **6.3.5. Attachments to the Model Contract**

Provide a Small Business Subcontracting Plan IAW Federal Acquisition Regulation (FAR) 52.219-9 and Defense Federal Acquisition Regulation Supplement (DFARS) 252.219-7003 (or DFARS 252.219-7004 if the offeror has a comprehensive subcontracting plan). Successful Offerors' Small Business Subcontracting Plans will be incorporated in each applicable Contractor's CFT ID/IQ contract. (PWS 4.6) (Applicable to large businesses only).



## ITO ATTACHMENTS

### PAST PERFORMANCE PACKAGE ATTACHMENT

ITO Attachment – 1.1	PAST PERFORMANCE INFORMATION <a href="#">FORM (PPIF)</a>
ITO Attachment – 1.2	PAST AND PRESENT PERFORMANCE QUESTIONNAIRE
ITO Attachment – 1.3	SAMPLE QUESTIONNAIRE COVER LETTER
ITO Attachment – 1.4	SAMPLE CONSENT LETTER
ITO Attachment – 1.5	SAMPLE CLIENT AUTHORIZATION LETTER
<a href="#">ITO Attachment – 1.6</a>	<a href="#">COMMITMENT TO PERFORM AS PROPOSED LETTER</a>
ITO Attachment – 2.0	PROPOSED TEAM LIST

## ITO ATTACHMENT 1.1 Past Performance Information (PPI) for Offerors

Offerors must use the PPI Tool (Use latest version at <https://www.sam.gov>) in order to electronically submit the PPI portion of the Past Performance Volume in accordance with the RFP (FAXXXX-XX-R-XXXX) for CFT Section L– Instructions to Offerors, Attachment 1.1.

### Downloading the PPI Tool

The PPI Tool can be downloaded by performing the following steps (if you are unable to download the Tool, contact the CO for assistance):

1. Access the <https://www.sam.gov> website.
2. Find the solicitation posting.
3. Locate, download, and open the “PPI\_Tool\_Download\_Instruction” Word document which will contain an embedded ppi.toolaccdb file.
4. Right-click on the ppi\_tool.accb icon. Select Copy. Paste the ppi\_tool.accb icon to a location on your computer. Right-click on the newly pasted ppi\_tool.accb icon and rename the file name as the prime contractor + RFP number + file extension. (e.g. XYZCompanyFAXXXX21RXXX.accb).

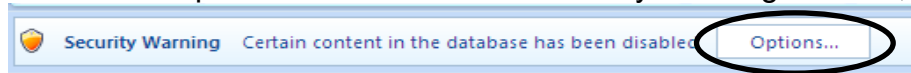
If the copy/paste function does not work, select the ppi\_tool.accb icon and drag it to a location on your computer desktop and rename the file name as the prime contractor + RFP number + file extension. (e.g. XYZCompanyFAXXXX21RXXX.accb).

**Note:** PPI Tools saved in Microsoft Office versions 2007 and greater will be saved with “.accdb” file extension.

### Entering information in the PPI Tool

After selecting and saving the tool, enter information by performing the following steps:

1. Open the saved PPI Tool.
2. Select the “Options” button from the “Security Warning” banner, if applicable



3. The “Security Alert” pop-up screen displays.

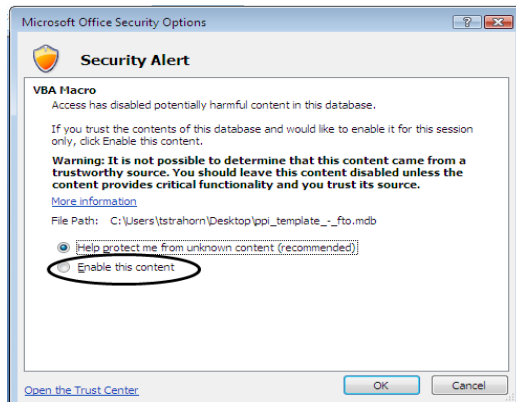


Figure 1: Security Alert Pop-up

**Note:**

- Files saved using Microsoft Office 2010 will have the “Enable Content” button on the “Security Warning” banner and therefore will not get a Security Alert pop-up.
  - If a "read only" file is opened, in order to populate data in the file, click "Save As" in the "Read-Only" message bar. Enter the filename as the prime contractor + RFP number + file extension (e.g. XYZCompanyFA861710R6158.accdb).
4. Select the radio button “Enable this content” and then click “OK.” A setup pop-up screen displays.

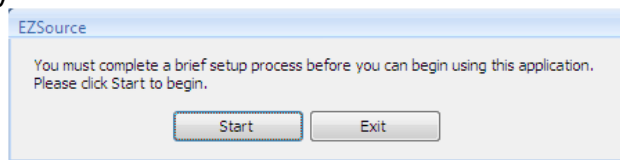


Figure 2: Setup Pop-Up

5. Select the “Start” button. The “Application Setup” screen displays.

Figure 3: Application Setup Screen

Note: Once the Offeror's Name and RFP Number have been entered they can be edited by selecting the “Edit Offeror And RFP Number” button from the “Contractor's Menu”

6. Enter the Offeror's Name and RFP Number and then click the “Next” button. The application setup continues.

Application Setup

How will you be entering your Past Performance data? Selecting the appropriate option below will tailor this application to your situation.

☒ The Offeror Prime will be entering Past Performance data for all subcontractors

☐ The Prime and individual subcontractors will each enter their own Past Performance data

<< Back    Next >>    Exit    Help

### Figure 4: Continue the Application Setup

7. Choose the appropriate option by selecting the corresponding radio button and then click the “Next” button. The “Contractor’s Menu” displays.

The screenshot shows a window titled "Contractor's Menu" with a standard Windows-style title bar (minimize, maximize, close buttons). Below the title bar, a paragraph of text reads: "Complete each step in the order indicated. Create one form as the prime only. The Business Relationship document is used for identifying the offerors and their partners and subcontractors." Below this text is a vertical stack of five rectangular buttons with rounded corners and a light gray gradient. The first button, "STEP #1: SET UP BUSINESS RELATIONSHIPS", is highlighted with a blue dashed border. The other buttons are "STEP #2: ENTER PAST PERFORMANCE INFORMATION", "STEP #3: PRINT REPORTS", "STEP #4: SUBMIT", and "EDIT OFFEROR AND RFP NUMBER". To the right of the buttons, there is a section titled "All Records Complete?" followed by two lines of text: "Business Relationships: N/A" and "Past Performance: N/A". At the bottom right of the window are two more buttons: "Exit" and "Help".

Contractor's Menu

Complete each step in the order indicated. Create one form as the prime only. The Business Relationship document is used for identifying the offerors and their partners and subcontractors.

STEP #1: SET UP BUSINESS RELATIONSHIPS

STEP #2: ENTER PAST PERFORMANCE INFORMATION

STEP #3: PRINT REPORTS

STEP #4: SUBMIT

EDIT OFFEROR AND RFP NUMBER

All Records Complete?


Business Relationships: N/A


Past Performance: N/A

Exit




Help

**Figure 5: Contractor's Menu**




8. Click the “Step 1: Set up Business Relationships” button  to create a business relationship, if applicable, for each business entity before proceeding throughout the PPI Tool (refer to [Section L](#) of the RFP for detailed instructions). Identify all prime and sub-prime organizations and categorize them according to the appropriate role in the proposed acquisition. The “Business Relationships” screen displays.

 Business Relationships

Click New to add a new Business Relationship. Double-click an item from the list to edit/delete an existing Business Relationship.

Sort By: **Offeror's Name**   

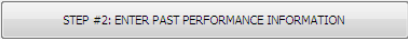
COMPLETE	OFFEROR'S NAME	CONTRACTOR'S NAME	ROLE	% WRK	PLACE OF WORK

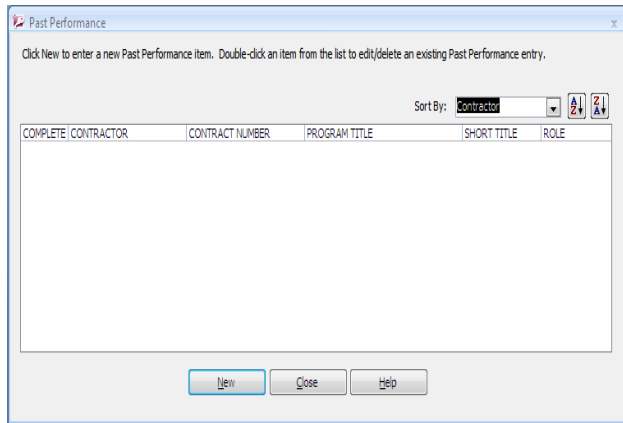
  

### Figure 6: Business Relationships

9. Click the “New” button to create a business relationship for the proposed acquisition. An additional “Business Relationships” screen displays.

Figure 7: Enter New Business Relationship

10. Complete the fields as follows (fields marked on the screen with an asterisk “\*” are required):
- Contractor’s Name: Self-explanatory
  - Role in Proposed Acquisition: Choose one of the four options – Prime, Sub, Joint Venture, or Other (Explain). An explanation comment box will display when you select “Other.”
  - Place of Work: Location where contractor will perform work.
  - Percentage of Work: Identify percentage of work contributed by specified business entity
  - Responsibilities: Detail proposed responsibilities of specified business entity.
11. Select one of the buttons at the bottom of the screen.
- Add – Saves the current business relationship and allows for the addition of a new one.
  - Close – Cancels the current business relationship without saving.
- Note:** In order to edit or delete an existing business relationship in the list, double-click on it.
12. Select the “Close” button on the “Business Relationships” screen after all of the business relationships has been added.
13. Click the “Step 2: Enter Past Performance Information (PPI)” button
- 
- to enter the Past Performance Information. The “Past Performance” screen displays.



**Figure 8: Past Performance**

14. Click the “New” button to enter Past Performance Information for the proposed acquisition. An additional “Past Performance” screen displays.

**Figure 9: Enter Past Performance Information**

15. Complete the fields on each of the tabs as follows (fields on the screen marked with an asterisk ‘\*’ are required):
- **Contract Information Tab**
    - Contractor: Select from the dropdown the appropriate business entity.
    - Cage Code: Self-explanatory.
    - Contract Number: If you don’t have a contract number, enter “N/A.”
    - Program Title: Enter full name of program.
    - Contr Agency/Customer: Enter servicing contracting agency and customer (office symbols suffice).
    - DUNS Number: Self-explanatory
    - Delivery Task/Order: If the order is provided as a stand-alone reference, enter the task/call/delivery/purchase order number.
    - Contract Type: Enter Firm-Fixed-Price (FFP), Cost Plus Fixed-Fee (CPFF), Indefinite Delivery/Indefinite Quantity (ID/IQ), LH, Blanket Purchase Agreement (BPA), Cost

Plus Incentive-Fee (CPIF), Cost Plus Award Fee (CPAF), etc. For additional clarification, click the question mark button.

- Short Program Title (i.e. Acronym): Enter abbreviated title for the program or enter “N/A.”
- Contract Dollar Value:
  - Original: Input total contract dollar value, with all options if applicable, in the amount originally awarded on the referenced contract.
    - If ID/IQ or BPA, provide total ceiling.
    - If stand-alone task/call/delivery/purchase, provide amount of the individual contract.
  - Current: Input total contract dollar value, with all options if applicable, as the contract stands at time of PPI submission.
    - If ID/IQ or BPA, provide total ceiling.
    - If stand-alone task/call/delivery/purchase, provide amount of the individual contract.
  - Explain the differences in Contract Value, if applicable: Enter an explanation of the difference between the original contract dollar value and the revised value as of the time of PPI submission.
- Period of Performance (mm/dd/yy)
  - Start Date: Input start date of contract.
  - Original End Date: Input original end date based on award.
  - Current End Date: Input end date, as the contract stands at time of PPI submission.
  - Explain the differences in Period of Performance, if applicable: Enter an explanation of the difference between “Original End Date” and “Current End Date.”
- Program Details Tab
  - Brief Description of Effort as:
    - Select Prime, Sub, Joint Venture, or Other (Explain). An explanation comment box will display when you select “Other.”
    - Provide a brief description of the service provided and actual work performed under this contract reference.
    - \*\*\*\*If applicable: Provide information on performance problems encountered on the identified contracts. At a minimum, briefly describe the problem experienced, actions taken to alleviate the problem, and whether or not the problem was satisfactorily overcome.\*\*\*\*
  - Explain how your performance on this contract is relevant for each applicable factor or subfactor, as instructed under Past Performance in [Section M](#) of the RFP. Include any unique aspects that demonstrate relevancy in this effort. Provide evidence to support such relevance to the requirements as described in the RFP.

- 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).

**Percentage of Work to be Performed**

**Subfactor 1 – Program Management**

**Subfactor 2 – Resource Management**

**Subfactor 3 – Quality Management**

**Subfactor 4 – Small Business Subcontracting**

- Compliance with FAR 52.219-8, Utilization of Small Business Concerns. Leave this section blank.
- Subcontracting Plan. Leave this section blank.
- POC & Key Individuals Tab
  - Key Individuals: Click the “New” button to specify any key individual or individuals who participated in this program or who may support the proposed acquisition. Also indicate their roles for both acquisitions, previous and current. To edit or delete an existing key individual, double-click an item from the list.  
**Note:** In accordance with FAR 15.305(a)(2)(iii), relevant contract efforts performed by from key personnel may be evaluated. If you wish to include the past performance of individual key personnel, select the “New” button for each individual and fill out the necessary information.
  - Customer Points of Contact: Click the “Program/Site Manager,” “Contracting Officer” or “Admin POC” button for the point of contact that you would like to add, edit, or delete.  
**Note:** For government contracts provide current information on Program Manager, Contracting Officer, and Admin POC, if available.  
For commercial contracts provide points of contact fulfilling these same roles, if available.

16. Select from the buttons at the bottom of the Past Performance screen:

- Save – Saves the Past Performance Information and displays the “Contract Information” tab on the Past Performance screen.
- Close – Closes the Past Performance screen. If there were any updates, a pop-up window displays asking to save before closing.
- Delete – Deletes the current PPI record. A pop-up window displays, select “Yes” to delete the record or “No” to close the window without deleting the record.

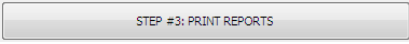
**Note:** In order to edit or delete an existing PPI record in the list, double-click on it.

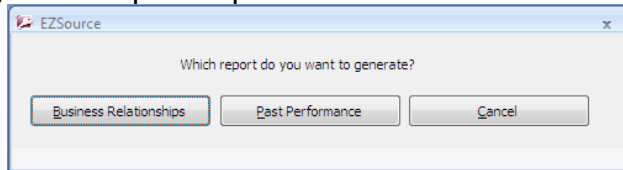
17. Select the “Close” button on the “Past Performance Information” screen after all of the PPI records have been added.



## Printing Reports and Submitting PPI Tool

In order to print the Business Relationships and PPI reports, perform the following steps:

1. Click the “Step 3: Print Report” button . A pop-up displays asking which report to print.

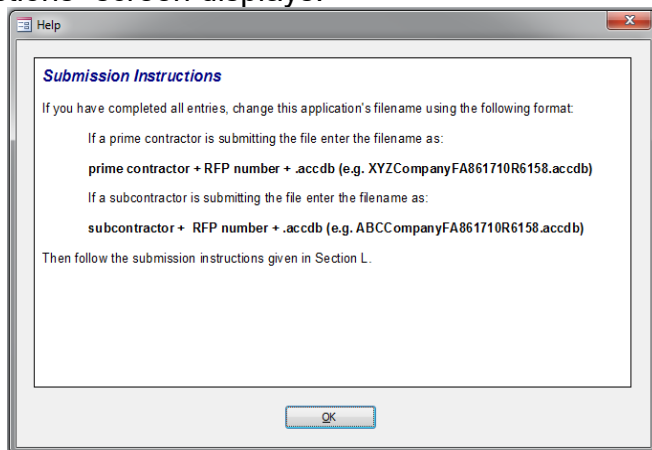


**Figure 10: Select Report to Print**

2. Select separately each of the two options, “Business Relationships” or “Past Performance.” The Business Relationships and Past Performance documents will print separately; combine the two to create your Past Performance Volume.

In order to submit the Business Relationships and PPI, perform the following steps:

3. Click the “Step 4: Submit” button . The “Submission Instructions” screen displays.



**Figure 11: Submission Instructions**

4. Follow the submission instructions. Hard copies of the pages generated from this tool shall be used in the hard copy of the past performance volume subject to the limitations outlined in this RFP and should be Tab 1 of the past performance volume.

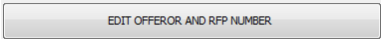
### Note:

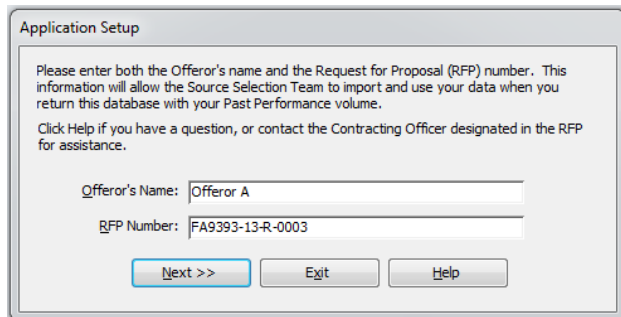
- Submit an electronic copy (e.g. CD) of the saved PPI database file with your proposal. If a prime contractor is submitting the file enter the filename as:
  - prime contractor + RFP number + file extension (e.g. XYZCompanyFA861710R6158.accdb)
- If a subcontractor is submitting the file enter the filename as:
  - subcontractor + RFP number + file extension (e.g. ABCCompanyFA861710R6158.accdb)

- Once the file is saved to a CD or any location that is marked as “Read-only,” it must first be saved to the desktop in order to read/edit the file.

### Editing Offeror and RFP Number

In order to edit the Offeror name and/or the RFP number identified during start-up, perform the following steps:

1. Click the “Edit Offeror and RFP Number” button . The “Application Setup” screen displays.



The image shows a screenshot of the 'Application Setup' dialog box. It has a title bar that says 'Application Setup'. Inside, there is instructional text: 'Please enter both the Offeror's name and the Request for Proposal (RFP) number. This information will allow the Source Selection Team to import and use your data when you return this database with your Past Performance volume. Click Help if you have a question, or contact the Contracting Officer designated in the RFP for assistance.' Below the text are two input fields: 'Offeror's Name:' with the value 'Offeror A' and 'RFP Number:' with the value 'FA9393-13-R-0003'. At the bottom are three buttons: 'Next >>', 'Exit', and 'Help'.

Figure 12: Change Name and RFP Number - Application Setup

2. Update the Offeror's name and/or RFP number.

Click the “Next” button  twice to return to the “Contractor's Menu”.

OfferorOfferorOfferor

**ITO ATTACHMENT 1.2**

**PAST PERFORMANCE QUESTIONNAIRE**

*WHEN FILLED IN THIS DOCUMENT IS SOURCE SELECTION SENSITIVE INFORMATION LAW FAR 3.104*

**SECTION 1: CONTRACT IDENTIFICATION**

- A. Contractor: \_\_\_\_\_
- B. Cage Code of contractor contract was awarded to: \_\_\_\_\_
- C. Contract number: \_\_\_\_\_
- D. Contract type: \_\_\_\_\_  
(If multiple types (i.e. Firm-Fixed Price with Time & Material), list percentage and dollar amount of Firm-Fixed Price portion)
- E. Was this a competitive contract? Yes \_\_\_\_ No \_\_\_\_
- F. Period of performance: \_\_\_\_\_
- G. Initial contract cost: \$ \_\_\_\_\_
- H. Current/final contract cost: \$ \_\_\_\_\_
- I. Reasons for differences between initial contract cost and final contract costs:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- J. Description of service provided:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**SECTION 2: CUSTOMER OR AGENCY IDENTIFICATION**

- A. Customer or agency name: \_\_\_\_\_
- B. Customer or agency description (if applicable): \_\_\_\_\_
- C. Geographic description of services under this contract, i.e. local, nationwide, worldwide, other Commands:  
\_\_\_\_\_  
\_\_\_\_\_

**SECTION 3. EVALUATOR IDENTIFICATION**

- A. Evaluator's name: \_\_\_\_\_
- B. Evaluator's title: \_\_\_\_\_

## RFP ATTACHMENT 8 – INSTRUCTIONS TO OFFERORS

- C. Evaluator's phone/fax number: \_\_\_\_\_
- D. Evaluator's email: \_\_\_\_\_
- E. 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:

<u>CODE</u>	<u>PERFORMANCE LEVEL</u>
B	BLUE/EXCEPTIONAL - The contractor's performance meets contractual requirements and exceeds some or 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.
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.

Program and Resource Management					
	B	G	Y	R	N
Did the contractor execute a smooth transition to include badging, hiring of personnel?					
Did the contractor maintain relations with the outgoing contractor?					
Did the contractor perform IAW the contract, i.e. meet contract requirements/metrics, within the first three months of contract execution following the transition period? Did the contractor meet all contract requirements during this timeframe while still performing standard personnel hiring actions and duties?					
Did the Contractor successfully manage multiple requirements at multiple sites?					
Did the Contractor successfully perform daily workload to include meeting schedules, performance, and quality of assigned work? Was any Government intervention or augmentation needed?					
If subcontractors were used in executing this contract, did the Contractor successfully manage the subcontractors?					
Rate the Contractor's ability to hire and retain qualified personnel and to provide continuous training to maintain critical skills.					
Rate the Contractor's ability to successfully meet rapid deployment requirements, security issues, maintain key personnel and provide a flexible workforce to meet urgent requirements.					

ATTACHMENT 4 - INSTRUCTIONS TO OFFERORS (ITO)

Did the Contractor provide prompt notification of problems impacting performance?					
Rate the Contractor's ability to maintain cooperative business relationships with Government personnel?					
If issued, rate the Contractor's performance in rectifying any cure notices?					
Did this contract require the Contractor to submit Flight Operating Procedures and/or Ground Operating Procedures IAW DCMAI 8210.1C? If so, how well did the Contractor understand and execute them?					

Quality Management					
	B	G	Y	R	N
Did the Contractor successfully perform in accordance with their quality management system?					
Did the Contractor successfully apply and monitor corrective actions and ensure successful and timely problem resolution?					
Overall, how would you rate the Contractor's quality system?					

Price					
	B	G	Y	R	N
Did the Contractor successfully perform at the price/rate they proposed?					
Did the Contractor come back for additional funding/Request for Equitable Adjustment (REA)?					
Did the Contractor successfully manage their funding and timely notify the Government if CLIN levels are low?					
Did the Contractor have issues with maintaining an adequate accounting system?					
Did the Contractor successfully track, monitor, manage, control, and audit task order cost down to the Contract Line Item Number (CLIN) and sub-CLIN level?					

Overall					
	B	G	Y	R	N
How would you rate the contractor's overall performance against your requirements?					
Was the contractor responsive to your needs?					
Did the contractor team well with stakeholders at working group meetings?					

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

3. Does your contract have multiple sites? How many sites? Where? How many people at each site?

ATTACHMENT 4 - INSTRUCTIONS TO OFFERORS (ITO)

4. How many Corrective Action Requests and what levels have been issued on this contract? Does the contractor resolve these issues in a timely manner?

5. Is there anyone else we can send this questionnaire to? Please give us a POC and their contact information.

6. Are you aware of any like contracted efforts performed by this contractor? Please provide the contract number and a POC with contact information.

7. 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.).

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**SECTION 5: NARRATIVE SUMMARY**

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

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What were the contractor's most negative aspect in the performance of the contract?

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

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

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\_\_\_\_\_  
Evaluator's Signature

\_\_\_\_\_  
Date

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

*Please return this completed questionnaire to:*

:



**DEPARTMENT OF THE AIR FORCE**

**OFFICE ATTN: Name**

3001 Staff Dr, STE 1AG1 104A  
Tinker AFB OK 73145-3020  
Telephone: 405-739-XXXX  
Fax: 405-736-8731  
[email@tinker.af.mil](mailto:email@tinker.af.mil)

**ITO ATTACHMENT 1.3  
SAMPLE QUESTIONNAIRE COVER LETTER**

LETTERHEAD

(Date)

FOR OFFICIAL USE ONLY

SUBJECT: Present/Past Performance Questionnaire for the [XXXX Program](#) Solicitation Concerning Contract Number(s) (CONTRACT AND ORDER NUMBER (IF APPLICABLE) TO BE EVALUATED). The effort was performed by (SPECIFIC ENTITY THAT PERFORMED THE WORK) under (CAGE CODE).

- (a) We are currently responding to 327 Air Sustainment Wing (ASW), 727 Aircraft Sustainment Group, Tinker Air Force Base, Oklahoma, Request for Proposal (RFP) FA8106-09-R-0010 for the C-38 Contractor Logistics Support (CLS) requirements. This acquisition is being conducted as a price performance trade-off source selection. The RFP specifically requires that we, as an Offeror, send the attached questionnaire to several points of contact (POC) on recent and relevant efforts that we (or a proposed team member) have performed. As such, please take a few moments of your time to fill out the attached questionnaire.
- (b) DO NOT RETURN THE COMPLETED QUESTIONNAIRE TO US. The information contained in the completed Present/Past Performance Questionnaire is considered sensitive and cannot be released to us, the Offeror. The completed Present/Past Performance Questionnaire should be sent directly to the Government not later than (DATE TO BE INSERTED BY OFFEROR). The questionnaires should be faxed to: **OFFICE, ATTN: PCO NAME**, FAX number (405) 736-8731, or e-mailed to the following address: [name@tinker.af.mil](mailto:name@tinker.af.mil)
- (c) If you have any questions regarding the source selection, contact the Contracting Officer, [name](#). If you have questions regarding the clarification of contract number, POC or program title on the questionnaire, please contact (CONTRACTOR'S POC AND PHONE NUMBER FOR PAST PERFORMANCE ISSUES).
- (d) Thank you for your timely assistance.

Sincerely,  
(TITLE AND NAME OF COMPANY OFFICIAL)

Attachment: Present/Past Performance Questionnaire

**NOTE:** Offeror to insert information where there is (italics text surrounded by parentheses) in the sample letter.

**ITO ATTACHMENT 1.4**

**SUBCONTRACTOR/TEAMING PARTNER CONSENT FORM 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 during exchanges. In an effort to assist the Government's Past Performance Evaluation Team (PPET) in assessing your past performance relevancy and confidence, we request the following consent form be completed by the major subcontractors/teaming partners identified in your proposal. The completed consent forms should be submitted as part of your Past Performance Volume.

**SAMPLE CONSENT LETTER**

Dear (Contracting Officer)

We are currently participating as a (subcontractor/teaming partner) with (prime contractor or name of entity providing proposal) in responding to the Department of the Air Force (location) request for Proposal (solicitation number) for the (program title or description of effort).

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 form 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:



**ITO ATTACHMENT 1.5**  
**SAMPLE CLIENT AUTHORIZATION LETTER**

In an effort to assist the Government's Past Performance Evaluation Team (PPET) in assessing your past performance on recent and relevant commercial contracts, we recommend that the following letter be sent to your points of contact for those commercial efforts that you identify in your Past Performance Volume:

**SAMPLE CLIENT AUTHORIZATION LETTER**

(for commercial contracts)

Note: This should be placed on company letterhead

Client Authorization Letter

Dear (Commercial Client/Customer)

We are currently responding to the Department of the Air Force, OC-ALC Request for Proposal (RFP No.) for the (program title or description of effort).

The Government is placing increased emphasis on past performance in order to obtain best value in source selections. They are requesting that clients of companies who submit proposals in response to their RFP for the program/effort identified above be identified and that their participation in the validation process be requested. Therefore, in the event you are contacted for information on work we have performed on (list program); you are hereby authorized to respond to those inquiries.

We have identified Mr./Ms. (Name) of your organization as the point of contact based on their knowledge concerning our work. Your cooperation is appreciated. Any questions may be directed to (Name, title, phone number and fax number for the POC)

**ITO ATTACHMENT 1.6**

**SUBCONTRACTOR/TEAMING PARTNER COMMITMENT TO PERFORM AS PROPOSED LETTER**

The Prime Contractor and Subcontractor shall complete and sign the letter. A separate letter is required for each subcontractor/teaming partner, etc.

**SAMPLE COMMITMENT TO PERFORM AS PROPOSED LETTER**

**Commitment to Perform as Proposed.**

In the event a contract is awarded resulting from the proposal submitted by XXXX (prime contractor), Prime contractor XXXX and Subcontractor XXXX hereby commit to joint performance as described in the proposal.

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

Company Name  
Prime Contractor

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

Company Name  
Subcontractor

ATTACHMENT 4 - INSTRUCTIONS TO OFFERORS (ITO)

**ITO ATTACHMENT 2.0  
PROPOSED TEAM LIST**

TEAMING LIST

Offeror (Prime) Contractor:

CAGE Code:

DUNS Number:

Designation Codes:

Joint Venture: JV

Informal Joint Venture: IJV

Prime/Sub: PS

Mentor/Protégé: MP

Subs/Teaming Contractor:

Designation Code:

CAGE Code:

DUNS Number:

1.

2.

3.

4.

5.

6.

7.

8.

9.

10.

### ITO ATTACHMENT 2.2 CROSS REFERENCE MATRIX

For prospective offerors: In the table below, offerors shall complete the “Technical Proposal Location” column. Offerors shall indicate the paragraph number within the Volume II, Technical Proposal, which addresses the corresponding requirement. For example, Subfactor 1, Element 1(a), offerors shall indicate the location within the Volume II Technical Proposal which addresses the Subfactor 1(a) requirement (and corresponding PWS paragraphs). Include this matrix as part of the Volume II, Technical Proposal.

Cross Reference Technical Requirements	PWS Paragraph	Instructions to Offerors	Evaluation Factors for Award	Technical Proposal Location (Indicate Paragraph Number)
Subfactor One Program Management				
Element 1a	4.3	3.2.3a	2.2.1a	
Element 1b	2.0, 4.1	3.2.3b	2.2.1b	
Element 1c	2.0, 4.1, 4.3	3.2.3c	2.2.1c	
Element 1d	4.1.1, 4.1.2	3.2.3d	2.2.1d	
Element 1e	2.0, 4.1, 4.2, 4.2.1, 4.2.2, 4.2.3	3.2.3e	2.2.1e	
Element 1f	4.7.1, 4.7.1.1	3.2.3f	2.2.1f	
Subfactor Two Resource Management				
Element 2a	4.2, Attachment A	3.2.4a	2.2.2a	
Element 2b	4.2	3.2.4b	2.2.2b	
Element 2c	5.2	3.2.4c	2.2.2c	
Subfactor Three Quality Management				
Element 3a	4.6, 4.6.1, 4.6.2, 4.6.3	3.2.5a	2.2.3a	

ATTACHMENT 4 - INSTRUCTIONS TO OFFERORS (ITO)

Element 3b	4.6.3.1, 4.6.3.1.1, 4.6.3.1.2	3.2.5b	2.2.3b	
Element 3c	4.6.2, 4.6.3.2, 4.6.3.2, 4.6.3.2.1	3.2.5c	2.2.3c	
Subfactor Four Small Business Applications				
Element 4a	4.8	4.2.6a	2.2.4a	
Element 4b	4.8, 6.2.2	4.2.6b	2.2.4b	