

TO SECTION L DRAFTER: DELETE THIS LEGEND AND THE GUIDANCE NOTES HEREIN AFTER YOU FINALIZE YOUR PARTICULAR SECTION L.

This template provides the language used for the typical competitive source selection. However, different evaluation and selection strategies will likely require more tailoring than indicated and therefore should be tailored as needed to meet the needs of the procurement.

Areas highlighted in yellow identify places in the document that must be updated with information specific to the particular acquisition and situation.

<NOTE TO DRAFTER> areas highlighted in green indicate optional items, which require consideration by the Drafter for inclusion in the document.

PART A GENERAL INSTRUCTIONS

1. GENERAL

Offerors are required to submit sufficient information concerning all evaluation factors to enable Government personnel to fully assess the capabilities of the Offeror to perform all requirements. The proposal must be sufficient in detail and scope to enable evaluation and provide the evaluators a clear understanding of the Offeror’s approach, expertise, and capability as required by the solicitation. Proposals must demonstrate that the Offeror has a thorough understanding of all requirements and associated risks and is able, willing, and competent to devote the resources necessary to meet all requirements. The Offeror shall not alter or rearrange the solicitation. The burden of proof for all substantiation within the proposal rests with the Offeror. Offerors are advised that the Government may incorporate any part of the Offeror’s proposal deemed beneficial to the Government, into the final contract, with or without discussions. Cost/Price information, (e.g., dollar values and/or hourly rates) shall appear only in Annex X ((Small Business Subcontracting Plan) and Table T-X (Small Business Goals)), Volume 5 (Cost/Price), and Volume 6 (Contract Administration) and Volume 7B (Streamlining, Book B). Alternate proposals [are/are not] acceptable <Note to Drafter: If alternate proposals are not acceptable, but Streamlining Volume 7B is included, add> "with the exception of any proposed streamlining proposed in accordance with Volume 7B, Streamlining, Book B".

In presenting material in the proposal, the Offeror is advised that quality of information is more important than quantity. Clarity, brevity, and logical organization should be emphasized during proposal preparation. It is the responsibility of the Offeror to present enough information to allow the Government to evaluate its proposal without discussions. Unsubstantiated statements that the prospective Offeror understands, can or will comply with the specifications, or paraphrasing the requirements or parts thereof are considered inadequate and may render a rating of unacceptable.

The Offeror shall include any data necessary to illustrate the adequacy of the various assumptions, approaches, and solutions to problems. There is no need to repeat information in more than one volume. The detailed information must be included in the most logical place and summarized and referenced in other areas if an overlap exists. Do not provide elaborate brochures or other presentation material beyond that sufficient to present a complete and effective proposal.

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Throughout these instructions, “Offeror” is defined as the prime contractor with its CAGE code identified in Block 15A on Standard Form (SF) 33, Solicitation, Offer, and Award. A “Joint Venture” (JV) is a partnership or teaming arrangement that is formed for the purpose of responding to this solicitation when the prime contractor consists of more than one legal entity. “JV Team Members” are the entities that make up a Joint Venture. The term “entity” is used to mean any or all of the following: prime contractor, JV, JV team members, any subcontractor, and corporate parent, division, subsidiary, or affiliate (e.g., any contractor with a different CAGE Code/DUNS than the Offeror). The following entities are defined as principal entities and only principal entities will be used in the past performance and **corporate experience** evaluations: (a) the prime contractor; (b) JV Team Members; and (c) other entities that are proposed to perform at least **15.00%** of the proposed total **cost/price** for the contract; and (d) entities that are proposed to perform a critical function, whether technical or financial, in the performance of the resulting contract. **Critical functions include but are not limited to: XXXXX.** Offerors are advised that in order to demonstrate work commitment, each principal entity must be identified in Volume **5 Cost/Price** and associated with a commensurate dollar value.

2. PROPOSAL FORMAT AND SUBMISSION

Proposals should be formatted using a Times New Roman 12 point normal font (no reduction permitted), single-spaced with 1-inch margins all around, and formatted for/printed on standard 8.5 x 11 inch paper. If Government attachments have a different format/font, the Offeror may use the format/font in the attachment as provided. All pages should be numbered with volume, paragraph, and page numbers. When foldout pages are used, they must not exceed 11 x 17 inches and will be counted as 1 page. Drawings may be provided separately and may be any size but should be folded to approximately 8.5 x 11 inch standard size and will count as 1 page. If the Offeror uses graphs to convey information, the graphs must show enough detail to easily discern the information described. Graphs and tables should be presented in no smaller than a 10 pt. font. Graphs should contain a grid, which allows values to be read directly from the graph to the same detail that a 10 x 10 to the ½-inch grid provides. Graphic resolution should be consistent with the purpose of the data presented. Text utilized in charts, figures, and graphics should also be no smaller than a 10pt font and may use a font type selected by the Offeror. Each volume, book, or annex should be provided separately in a 3-ring binder. The binders should be of an appropriate thickness for the number of pages it contains (e.g., a 30-page book should not be placed in a 2-inch binder).

2.1 Electronic Submission of Proposal

This section is intended to provide information to the Offeror on the electronic format and application software to be used for submitting proposals. Use of the software and procedures described in this section will reduce the amount of time and effort needed to receive and install proposals onto the electronic evaluation system, and will ensure that the proposals received are suitable for reading electronically. If a discrepancy exists between the original paper copy of the proposal and the original electronic copy on the CD-ROM disk, the original **paper/electronic** copy shall take precedence.

2.1.1 Electronic Proposal Media

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The Offeror should submit all volumes of its proposal electronically on CD-ROM(s) compatible with the operating system and applications defined in Section 2.1.2 (Operating System and Applications). The Offeror should put as much proposal material as possible on each CD-ROM, keeping the portions of the proposal that contain pricing information on separate CD-ROM(s) from the portions of the proposal that do not contain pricing information. For this solicitation, Annex X ((Small Business Subcontracting Plan) and Table T-X (Small Business Goals)); Volume 5 Cost/Price; Volume 6 Contract Administration; and Volume 7B Streamlining, Book B, contain cost/price information and should be delivered on separate CD-ROM(s) from the remainder of the proposal.

Table G-3 (Proposal Structure) identifies the proposal structure for each volume. The Offeror should submit two sets of CD-ROMs. The first set of CD-ROM disks should be marked "Original" and the second set of CD-ROM disks should be marked "Backup". The sets of CD-ROM disks should be clearly marked with the Offeror's name and address, the point of contact's name and phone number, the proposal volumes contained therein, and "Source Selection Information – See FAR 2.101 and 3.104".

2.1.2 Operating System and Applications

The proposals will be accessed utilizing the Microsoft Windows 7 Operating System. Proposal information shall be submitted using the following applications: Microsoft Word 2010, Microsoft Excel 2010, Microsoft PowerPoint 2010, and Microsoft Project 2010; however, letters and other signed documents shall be provided as a fully searchable Portable Document Format (.pdf) file. Use of other application software for submission of proposals is prohibited except where specific instructions for non-.pdf or Office 2010 applications are provided.

2.1.3 Hyperlinks

Offerors may use hyperlinks within and among proposal volumes. However, there shall be no links from volumes that do not contain cost/price information to volumes that do contain cost/price information.

2.1.4 Virus Free Electronic Submission

Offerors are responsible for ensuring that its electronic proposal is virus free. The Offeror shall certify, in its proposal cover letter, that all electronic proposal information delivered throughout the evaluation (e.g., original proposal submission, responses to evaluation notices, Final Proposal Revisions) has been or will be checked for viruses and certify that its files are/will be virus free. The Offeror should specify the software, version, and virus definition used/that will be used to check the data.

2.1.5 Multimedia

The Offeror should not embed sound or video (e.g., MPEG) files within the proposal submission.

2.1.6 Graphics

Large files require greater computer system resources and are discouraged. The Offeror is encouraged to:

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- a. Simplify the color palette used in creating figures and minimize the use of color print or graphics to the maximum extent possible;
- b. Minimize size of graphics files; and
- c. Avoid scanned images.

2.1.7 File Naming Conventions

Valid extensions for files using their associated applications are listed below in Table G-1 (file Extensions):

Table G-1 File Extensions

Type of Application/Files	Valid Extensions
Portable Document Files	.pdf
Microsoft Word documents	.docx
Microsoft Excel documents	.xlsx
Microsoft Power Point	.pptx
Microsoft Project	.mpp

The Offeror shall follow the basic structure of the file naming convention in Table G-2 (Offeror Electronic File Naming Convention) for electronic file submissions (e.g., proposal volumes, attachments, appendices), where "#" represents the sequential numbering of files. Offeror's shall keep the file name as short as possible (i.e., under 40 characters) so that the files are accessible on Government share drives. Files with longer names may become corrupt or inaccessible.

The Offeror should provide one folder for each volume or annex, containing all electronic files requested within the volume or annex. Please submit each volume, book, or annex as one file if possible. Offerors should not provide each section/paragraph as separate files.

The Offeror shall ensure that the electronically submitted files are directly traceable to paper copy submittals.

<Note to Drafter: The volume numbers in Table G-2 may change based on the order of importance contained in Section M.>

Table G-2 Offeror Electronic File Naming Convention

Volume Number	Title	File naming convention
1	Executive Summary	Vol 1 ES#.docx
	Table ES-1 Offeror Summary Table ES-2 Relevant Contract Summary	Vol 1 ES Tables.xlsx
2	Technical	Vol 2 Tech#.docx
	Technical Cross Reference Matrix	Vol 2 Tech CRM.xlsx
	List other attachments here	
3	Past Performance	Vol 3 PP#.docx

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	Table PP-1 Past Performance Contract Data	Vol 3 PP-1 PP Con Data.xlsx
	Release of Adverse Past Performance Authorization Letters; and/or Past Performance Point of Contact Information	Rel Ad PP Ltr#.pdf; and/or PP POC Info#.docx
4	Corporate Experience	Vol 4 CE#.docx
	Table CE-1 Applicable Contracts For CE Elements	Vol 4 CE ACE.xlsx
5	Cost/Price	Vol 5 Cost-Price#.docx
	List other attachments here	Vol 5 TBD.xlsx
6	Contract Administration	Vol 6 CA#.docx
7A	Streamlining, Book A (no cost/price information)	Vol 7 StreamA#.docx
7B	Streamlining, Book B with cost/price Information	Vol 7 StreamB#.docx
	Annexes	
Annex A	Relevant Portions of Final Versions of Previous SOW/PWSs for Past Performance and Corporate Experience	AnnA Rel SOW PWSs#.pdf and AnnA Rel SOW PWSs #.docx Please note: The Offeror should provide both a .pdf and .docx version if they are available. If not, a .pdf version only is acceptable.
Annex X	Small Business Subcontracting Plan and Table T-X (Small Business Goals)	Ann X SBSP SBG.docx
Annex # etc. (If needed)	List other Annexes here	TBD

3. PROPOSAL CONTENT AND VOLUMES

The Offeror must present its proposal information in a manner that facilitates a one for one comparison between the information presented and Section L proposal instructions. Proposal information must be structured such that its paragraph numbers/letters correspond to the proposal instructions paragraph numbers/letters, although the Offeror may add lower tier sub paragraphs.

Each volume and annex of the proposal shall be submitted as original and additional hard and/or electronic copies as specified in Table G-3 (Proposal Structure). The Offeror shall submit all paper and/or electronic copies of the proposal to the address provided in Section 4.0 (Submission and Packaging). Suggested page counts for each volume, if any, are also specified in Table G-3 (Proposal Structure). The title and table of contents pages, as well as tables, are not included in the suggested page count.

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Information submitted as an Annex to a particular proposal volume could include manuals, specifications, plans, procedures, and company policies, as well as other information requested in “Part B Specific Instructions” and do not count towards the suggested page count. Additionally, the individual subcontracting reports for the past performance volume are not included in the suggested page count.

Cost/price information, (e.g., dollar values and/or hourly rates) shall not be included in any volume other than Annex X ((Small Business Subcontracting Plan) and Table T-X (Small Business Goals)); Volume 5 Cost/Price, Volume 6 Contract Administration, and Volume 7B Streamlining, Book B.

<Note to Drafter: The volume numbers in Table G-3 may change based on the order of importance contained in Section M. Tailor the table based on the volumes and annexes in Section L.>

Table G-3 Proposal Structure

Volume Number	Volume/Annex Title	Suggested Pages	Paper Copies Required	Electronic Copies Required
1	EXECUTIVE SUMMARY	15	1 Original/4 Copies	1 Original and Copy 1
2	TECHNICAL	150	1 Original and 2 Copies	1 Original and Copy 1
3	PAST PERFORMANCE	50	1 Original and 2 Copies	1 Original and Copy 1
4	CORPORATE EXPERIENCE	75	1 Original and Copy 1	1 Original and Copy 1
5	COST/PRICE	As Needed	1 Original and 2 Copies Additionally provide 1 copy of the Volume without attachments.	1 Original and Copy 1
6	CONTRACT ADMINISTRATION	As Needed	1 Original and 2 Copies	1 Original and Copy 1
Volume 7A	Streamlining, Book A (no cost/price information)	TBD	1 Original/TBD Copy	1 Original/TBD Copy
Volume 7B	Streamlining, Book B with cost/price Information	TBD	1 Original/TBD Copy	1 Original/TBD Copy

Volume Number	Volume/Annex Title	Suggested Pages	Paper Copies Required	Electronic Copies Required
Annex X1	Relevant Portions of Final Versions of Previous SOO/SOW/PWSs/Other Supporting Documentation for Past Performance and Corporate Experience	As Needed	1 Original/1 Copy	1 Original/1 Copy
Annex X2	Small Business Subcontracting Plan and Table T-2 (Small Business Goals)	As Needed	1 Original/1 Copy	1 Original/1 Copy
Annex X#	xxxxx	xxxxx	1 Original and 2 Copies	1 Original and Copy 1

Each binder must contain the following information using tabs and dividers:

- a. Cover and title page;
- b. Title of proposal and proposal number as applicable;
- c. Offeror’s name, address and POC;
- d. Solicitation number;
- e. Proposal volume/book/annex number;
- f. Copy number; and
- g. Table of Contents (The table of contents must provide sufficient detail to easily locate important elements). At a minimum, it must include the paragraphs identified in the CRM.
- h. <NOTE TO DRAFTER – keep for classified> Catalog Card - Each volume must contain an 8 1/2" x 11" Catalog Card containing the information required for the cover and title page. The back of the card must be formatted with three columns entitled "Name", "Date Out", and "Date In". This card must be removable from the back of each binder.

Table G-4 lists the attachments provided to the Offeror within Section L. <NOTE TO DRAFTER - Update table as needed. Section L Attachments are subject to change, therefore, the drafter may select an appropriate numbering scheme depending on the structure and requirements contained in Section L.

Table G-4 Section L List of Attachments

Section L Attachment Number	Electronic File Title	Attachment Name
L-1	Vol 1 ES Tables	Table ES-1 Offeror Summary and Table ES-2 Relevant Contract Summary
L-1	Vol 2 T-1 Cross Reference Matrix	Table T-1 Cross Reference Matrix
L-2	Vol 2 T-2 SB Goals	Table T-2 Small Business

		Goals
L-3	Vol 3 PPQ	Past Performance Questionnaire
L-4	Vol 3 PP-1 PP Con Data	Table PP-1 Past Performance Contract Data
L-5	Vol 4 CE Tables	Table CE-1 Applicable Contracts For CE Elements
L-6	Vol 5 Cost/Price TBD	Cost/Price TBD

4. PROPOSAL SUBMISSION AND PACKAGING

<Note to Drafter: If all proposal information is requested as unclassified, use the following statement here, “All Proposals shall be UNCLASSIFIED.” And, delete the heading for subsection “4.1.a Unclassified Data” title and all of subsection “4.2 Classified Data”>

4.1 PROPOSAL SUBMISSION

4.1.a Unclassified Data

Clearly mark all packages with the solicitation number. The submission date for all Volumes of the proposal shall be no later than the date and time specified in Block 9 of Standard Form 33 (Solicitation, Offer and Award) of the solicitation. However, it is requested that one paper copy and one electronic copy on a CD-ROM of Table ES-1 (Offeror’s Summary), Table ES-2 (Relevant Contract Summary); Table PP-1 (Past Performance Contract Data); **Table CE-1 (Corporate Experience Element - Contract Reference Matrix)**; and Annex **X** (Final Versions of Previous SOW/PWSs/Other Supporting Documentation for Past Performance **and Corporate Experience**) be submitted **three weeks** prior to the submission date/time specified on Standard Form 33 (Block 9).

In the official proposal submission, please indicate any changes made to the information delivered **three weeks** early in the submission provided on the date and time specified in Block 9 of Standard Form 33 of the solicitation. If no changes are made, please state so at the beginning of Volume 1 (Executive Summary), Volume **3** (Past Performance), **and Volume 4 (Corporate Experience)**.

Method of delivery, such as by hand, United States Postal Service or commercial carrier, shall be coordinated with **XXXX XXXXX**, the Procuring Contracting Office (PCO) **(XXX) XXX-XXXX** and/or contract specialist listed below. Proposals shall be submitted using the address provided below. The initial Proposal shall not be submitted by facsimile or electronically via email.

NAVAL AIR SYSTEMS COMMAND
ATTN: Code: AIR- XXXX (Attn: Mr./Ms. XXXX XX)
Solicitation Number: N00019-XX-X-XXXX
Street Address
Bldg XXX and Office / Rm. XXX
City, State Zip Code

4.1.b Classified Data

Data classified above the Secret Level shall not be submitted unless coordinated and submitted in accordance with paragraph 4.1.c (Classified Data above Collateral Secret) below. Classified material shall be packaged separately. Packaging and handling of the classified material must be in compliance with SECNAV M-5510.36 and associated DoD directives and procedures. Classified data submitted via United States Postal Service or through an overnight express carrier must be IAW paragraph 4.2B.

Hand delivery of classified data is only permitted with prior coordination of the Procuring Contracting Officer (PCO), and requires display of a valid courier card prior to handover of information. Couriers must possess a current security clearance and background investigation required to handle the information within their possession. Contact the PCO at (XXX) XXX-XXXX a minimum of three working days prior to intended delivery date to arrange for a delivery appointment.

4.1.c Classified Data above Collateral Secret

- a) Notice Regarding the Submission of Special Access Required (SAR), Special Compartmented Information (SCI), or Top Secret Special Compartmented Information (TS/SCI)

The XXXXXX contract will be awarded at the collateral XXXXXX level. However, information above collateral Secret may be submitted to substantiate or support proposal evaluations.

Prospective Offerors who believe that their XXXXXX proposal will require the submission of information protected as Special Access Required (SAR) or Special Compartmented Information (SCI) must contact the Government personnel identified below as soon as possible.

For SAR, contact your SAR sponsor and the Department of the Navy Special Access Programs Coordinator, N89, XXXX XXXXXX at (XXX) XXX-XXXX.

For SCI, contact your SCI sponsor and the NAVAIR Contract Specialist XXXXXXXXXXXX at (XXX) XXX-XXXX.

These contacts will allow appropriate coordination to occur and will enable the prospective Offeror to gain the requisite approval from their SAR or SCI Sponsor, prior to the submittal of any SAR/SCI information. Upon approval of the SAR or SCI sponsor, specific instructions for submission of SAR/SCI information will be provided by the NAVAIR Contract Specialist XXXX XXXXX. Interested parties are advised that any classified submission will be subject to review with the SAR or SCI Sponsor.

Prospective Offerors who believe that its XXXXX proposal will require the submission of information protected as Top Secret, Special Compartmented Information (TS/SCI) must contact NAVAIR AIR XXXXXXXX XXXX XXXX at (XXX)-XXX-XXXX as soon as possible.

b) Submittal

It is the Offeror's responsibility to ensure that information above Collateral Secret is cleared to be included as part of the proposal or to be used during discussions. If the information can be redacted to bring it to Collateral Secret level or below, the Offeror shall sanitize the information, and with sponsor approval, submit with the proposal. For information that cannot be redacted to the Collateral Secret level or below, the Offeror shall submit in accordance with the following procedures:

- i. For SAR proposal submission, the Offeror shall submit a separate addendum to N89 upon Sponsor approval. For submittal instructions, contact Navy Special Access Programs Coordinator, N89, XXXX XXXXX at (XXX) XXX-XXXX and your Government Sponsor for approval of release.
- ii. For SCI proposal submission, the Offeror shall submit a separate addendum to NAVAIR upon Sponsor approval. For submittal instructions, contact NAVAIR AIR XXXX XXXX XXXXX at (XXX) XXX-XXXX.

4.2 PROPOSAL PACKAGING:

A. UNCLASSIFIED PACKAGING

The Offerors shall package the proposal volumes in cartons or equivalent packaging containers in the most efficient manner possible, grouping like volumes to the maximum extent possible. Each box should identify its contents by including a packing slip detailing each volume/book/annex number and title, and copy number. Each carton should be double wrapped. The outside of the carton should be plain and shall contain only pertinent shipping /mailing information. The inside carton shall be stamped or marked — “For Official Use Only”; and “Source Selection Information – See FAR-2.101 and 3.104”, for the intended recipient identified in 4.1 (Proposal Submission). The original set of proposals should be marked for NAVAIR PCO, AIR-XXXX identified in section 4.1 (Proposal Submission). The original set shall include a paper copy of the original proposal, all proposal volumes on CD-ROM, a completed and original signed Standard Form 33; acknowledgement of all solicitation amendments, if applicable; and Representations, Certifications and Other Statements of Offerors or Respondents (Section K of this solicitation) and other applicable fill-ins. Note: Any documents, which contain cost/price data, shall be on a separate CD-ROM disk(s) from the non-cost/price proposal information.

B. CLASSIFIED PACKAGING

Outer Wrap:
COMMANDER
ATTN: XXXXXXXXXXXX DIVISION
NAVAL AIR SYSTEMS COMMAND
Street Address
Bldg XXX and Office / Rm. XXX
City, State Zip Code

Inner Wrap:

Commander

ATTN: Code: AIR- XXXX (Attn: Mr./Ms. XXXX XX)

Solicitation N00019-XX-X-XXXX

NAVAL AIR SYSTEMS COMMAND

Street Address

Bldg XXX and Office / Rm. XXX

City, State Zip Code

5. CHANGES TO SOLICITATION

For any changes and additional information to the solicitation, please go to website:

<https://www.fbo.gov/>

Search the database for the solicitation number XXXXXX-XX-X-XXXX

6. TECHNICAL LIBRARY

<Note to Drafter: insert the following as applicable>

Generic Example 1 – A short example with both unclassified and classified information:

A Technical Library of information directly related to the requirements of this contract is available to all Offerors. The library consists of two partitions, an unclassified technical library, and a classified technical library. The content of the library is listed in Attachment L-X. The library is located at

(insert location – web, physical or both)

Generic Example 2 does not distinguish between unclassified/classified information and restricts access to prime Offerors.

A Technical Library of information directly related to the requirements of XXX solicitation is available to all Offerors intending to propose as a XXX prime. The library is located at:

XXXXXXXXXX

To gain access to the technical library, register on the website above. Requestors shall be required to provide e-mail addresses, phone number, and IP addresses.

Generic Example 3 is a detailed example that has both unclassified and classified information:

Unclassified

The unclassified technical library, also known as the Virtual Bidder’s Library, is located on a secure web site that requires a Government assigned user name and password, and an external certificate.

To request access to the secure web site, contact the Contract Specialist, MX. XXXXXXXX at XXXXXX@navy.mil, with the following information: Company name, classified mailing address, phone number, email address (if available), current CAGE number, DoD Central Contractor Registration (CCR) number and acknowledgement of the contractor’s responsibility under the U.S. export control laws and regulations. Potential Offerors shall acknowledge that no dissemination of any export-controlled technical data subject to this requirement will occur in a manner that would violate

applicable export control laws and regulations (DD Form 2345). Upon review of written request, verification of Potential Offeror’s status and acknowledgement of the Offeror’s responsibility under the US Export laws and regulations, web site access instructions (https://www site address, user name, and password) will be provided. Potential Offerors will need an External Certification Authority (ECA) certificate in addition to a user name and password to access the unclassified virtual bidder’s library. If a potential Offeror does not already possess an External Certificate, please consult the following site for details on how to obtain a compliant Medium Assurance ECA certificate: <http://iase.disa.mil/pki/eca/index.html>.

Classified

The classified technical library will be maintained at the following Location:

XXXXXX
XXXXXX
XXXXXX

Hours of Operation

XX AM – XX PM, Monday-Friday by appointment only. Contact XXXXX at XXXXXX.

Procedures for Accessing the Classified Technical Library

Access to the XXX Offeror’s Library room will be limited to one (1) Offeror at a time. No laptops, portable phones, digital cameras, or any recording device will be allowed into the XXX Offeror’s Library room. The host computer is located within a secure container. Video, keyboard, and a mouse are the only links available for users to browse the XXX Library host computer. There are no other ports available for accessing the XXX Offeror’s Library host computer. Offerors will sign both entry and exit recording sheets. Offerors will be allowed a maximum 2 and 1/2 hour browsing period. Offerors may request delivery of any document(s) from the XXX Offeror’s Library. The government will provide a CD with the requested XXX documents no later than one (1) business day following such request. The CD will be delivered by overnight mail to the address provided by the Offeror.

<Note to Drafter: insert the following Section 7 if oral presentations will be part of the evaluations. It should be noted that Oral presentation formats/proceedings can vary greatly from program to program so the following is only an example of language to be considered.>

7. ORAL PRESENTATIONS

(This is an example from a program that had oral presentations and went directly into oral discussions the same week.)

The Government will notify the Offerors of the date and time they are expected to brief the oral presentation portion of the Technical Volume 2.

Eligibility for proceeding with oral presentations will be based on meeting the prerequisite defined in Section M and submitting a complete and timely proposal to the Government.

a. Schedule for Presentation

The order of presentations will be determined by a random drawing of names for all Offerors that meet the prerequisite and submit a timely proposal. The Contracting Officer will notify

Offerors of the scheduled date and time of their presentation at least seven calendar days prior to the Offeror’s scheduled presentation date.

b. Rescheduling

Requests from the Offeror for rescheduling its presentation are strongly discouraged. However, the Government reserves the right to reschedule any Offeror’s presentation at the discretion of the Contracting Officer.

c. Setting and Form of Oral Presentations

Oral presentations will be made at a Government provided facility located at or near the Naval XXX Command, Naval XXX, City, State.

d. Recordation

The Government will record the presentations. The Government will furnish all necessary video equipment and a cameraperson. The Government will also provide an Offeror with a copy of the recording of its own presentation, upon request after contract award.

e. Offeror Employee Participation

Offerors, including subcontractor representatives, are limited to no more than X attendees in the room at one time. A conference room will be available so that alternate personnel may rotate in and out of the presentations/discussions. Additionally a phone will be available in the presentation/discussion room to interface with on-site or off-site subject matter experts.

At least 2 business days prior to the scheduled start time of the Offeror’s oral presentations, the Offeror shall provide the Government a listing of names, firms, and position titles of those individuals that will be attending the oral presentations to the Contract Specialist XXX (cc the PCO XXX)

f. Oral Presentation Procedures

i. Oral presentation charts are to be submitted to the Government with the written portion of the proposal.

ii. On the XX and XX day, the Offeror will be allotted the times noted in the “Oral Presentations and Discussions Agenda” table. The times are considered approximate and the Government does not require that an Offeror use the full time provided.

The Government will utilize the Offerors charts submitted with the proposal (Vol II) for the oral presentation. The Offeror may only use these during its presentation. The Offeror shall not modify these slides or supplement them with other written material (slides, flip-charts, handouts).

The Offeror is strongly encouraged to forego time and charts addressing company organizational structure and marketing information. In the event of minor administrative errors or inconsistencies on the briefing slides, Offerors will be allowed to make corrections during the oral presentation. Conversations between the

Government and the Offeror during the oral presentations shall be limited to clarifications only.

g. Discussions Procedures

The Government intends to conduct full discussions for the entire proposal, as defined in FAR 15.306(d) after the Offeror's initial oral presentation in order to maximize the Government's ability to obtain best value based on the requirement and the evaluation factors set forth in the solicitation. The Offeror should be prepared to respond to the Government's questions during these discussions. If there are open actions, discrepancies or inadequacies identified at the end of this session, they will be documented and provided in writing to the Offeror after completion of discussions. Actions closed during the course of discussions will be appropriately documented.

h. Presentation Supplies

The Government will provide a computer connected to an overhead projector/digital projector. The Offeror is responsible for any other presentation supplies that are not available from the Government. Use of flash/thumb/etc. drives with NMCI resources is not permitted; however, CD-ROMs may be used. At the conclusion of the presentation, the Offeror shall submit to the Government the original slides along with all overhead slides (paper copies and original slides) used during the presentation. Offerors are limited to technical information only, no mention of prices or profit shall be included. Offerors should mark slides in accordance with FAR 52.215-1(e), Restrictions on Disclosure and Use of Data.

PART B SPECIFIC INSTRUCTIONS

1. VOLUME 1 – EXECUTIVE SUMMARY

Note: This volume shall not contain any reference to **cost or price** aspects of the offer.

The following is a list of Section L Attachments that the Offeror shall use to provide information for this volume:

Attachment **L-1** Executive Summary Tables (ES-1 (Offeror Summary) and ES-2 (Relevant Contract Summary))

The purpose of the Executive Summary is to provide the Government with an overview of the Offeror’s entire proposal, excluding **cost/price**. The Executive Summary volume should be divided into the sections outlined below:

a. Offeror Summary Table

- (1) The Offeror shall complete Table ES-1 (Offeror Summary), provided in Attachment **L-1** (Executive Summary Tables), according to the instructions within the attachment, and submit it within this section and as a separate electronic file. This table summarizes the Offeror and its entities’ proposed type and level of work, indicating a commitment to that effort during contract performance. Offerors are advised that in order to demonstrate work commitment, each entity identified in Table ES-1 (Offeror Summary) must be identified in Volume **5 (Cost/Price)** and associated with a dollar value commensurate with the **Percent of Total Proposed Cost/Price** identified in Table ES-1 (Offeror Summary). Therefore, this table must be a reflection of what is proposed in Volume **5 (Cost/Price)**.
- (2) For the Past Performance **and Corporate Experience** evaluations, contract references that relate to a different CAGE code/DUNS than the proposed entity will be considered if the CAGE code/DUNS was created as a result of a corporate acquisition, reorganization, merger, or other administrative reason and refer to the same division in the same physical location for where the work is being performed or from where the work is being directed in accordance with the proposed roles and responsibilities. All current CAGE Codes/DUNS must appear in Table ES-1(Offeror Summary Table) which indicates a commitment of work for those entities. To facilitate the Relevancy determination for Past Performance **and Corporate Experience**, the Offeror shall provide a written explanation if multiple CAGE codes/DUNS for the same physical location are applicable to one entity. The written explanation shall detail the distinct roles and responsibilities for entities with different CAGE codes/DUNS at the same physical location for where the work is being performed or from where the work is being directed. The description shall include all changes in the organization as a result of a corporate acquisition, reorganization, merger, or other administrative reason and explain how the changes impact the relevance of any contract references provided.

<Note to Drafter: Use option A or option B.>

Option A (i.e., CLS) - pertains only to procurements where work is primarily performed at a Government site.

Note: “Place of Performance” for this solicitation pertains to the physical location of the prime or other entities that are deploying personnel or responsible for the work; not the Government site where the work is being performed. If work is being performed at a contractor site, then that would also pertain to Place of Performance.

Option B (i.e., Design Competition) pertains to procurements where work is primarily performed at a contractor site.

Note: “Place of Performance” for this solicitation pertains to the physical location of the prime or other entities that will perform the work.

- (3) Additionally, if applicable, the Offeror shall provide a description of the legal relationship between JV entities.

Table ES-1 Offeror Summary

Offeror:					
Entity Name	Physical Location of Entity	CAGE Codes/DUNS	Roles and Responsibilities with Work Description	Workshare - % Total Proposed Cost/Price	Principal Entity Yes or No?
Total Proposed cost/price (must add up to 100%)				100%	

b. Relevant Contract Summary Table

The Offeror shall complete the Table ES-2 (Relevant Contract Summary) provided in Attachment L-1 (Executive Summary Tables), for all contracts proposed as relevant for Past Performance and/or Corporate Experience for the principal entities. The Offeror shall complete the table according to the instructions within the attachment and submit it within this section and as a separate electronic file. The contract references designated in Table ES-2 (Relevant Contract Summary) shall be used in completing Volume 3 Table PP-1 (Past Performance Contract Data), and Volume 4 Table CE-1 (Applicable Contracts for CE Elements). For example, the contracts identified as P1, T1, S1, or C1 in the Relevant Contract Summary Table are the same P1, T1, S1, or C1 contracts identified in the Past Performance Contract Data Table, which are the same P1, T1, S1, or C1 contracts identified in Table CE-1 (Applicable Contracts for CE Elements).

Table ES-2 Relevant Contract Summary For Past Performance and Corporate Experience

Offeror:					
Entity Name	Contract Reference	Contract Number	Contract Type	Contract Title	*Description of Changes/Additions from Early Information
Prime or Joint Venture Company	P1				
	P2				
	P3				
JV team member A (where applicable)	T1				
	T2				
	T3				
	T4				
JV team member N (where applicable)	T5				
Subcontractor A	S1				
	S2				
	S3				
Subcontractor B	S4				
	S5				

* Contracts deleted should be identified in a narrative paragraph following Table ES-2.

c. Technical

The Offeror shall provide a succinct summary of what is proposed for each element, describing **the approach or the design configuration and/or the proposed solution**. In general, the description should be a short paragraph that provides only the factual description of what is proposed without adjectives or discussions of benefit. In a separate paragraph, identify **significant features or approaches of its proposal that exceed requirements, enhance performance or operations, or reduce risk with benefit to the Government**. Specifically identify where in the Technical Volume (e.g., paragraph and page number as a minimum) the details of these **features or** approaches are provided.

d. Contract Administration

The Offeror shall provide a summary of any exceptions or deviations, and proposed Section H clauses addressed in Volume **6** (Contract Administration).

e. **Streamlining**

The Offeror shall provide a summary of the significant streamlining suggestions addressed in Streamlining, Book A Volume 7A. If streamlining suggestions are not proposed, state so here and omit Volume 7.

2. VOLUME 2 - TECHNICAL

<Note to Drafter: The instructions for this technical section must tie directly to the technical criteria listed in Section M and should have paragraphs associated with each of those technical criteria.>

Note: This volume shall not contain any reference to cost or price aspects of the offer.

The following is a list of Section L Attachments that the Offeror shall use to provide information for this volume:

- Attachment L-1 Volume 2 Table T-1 Cross Reference Matrix (CRM)
- Attachment L-2 Volume 2 Table T-X Small Business Goals
- Attachment L-X TBD

The Offeror shall complete Table T-1 (Technical CRM), provided in Attachment (L-1) and submit it as the first page of Volume 2 (Technical), Book A and B and as a separate electronic file. The Technical CRM is included to help the Offeror develop its proposal and to ensure traceability of Section L paragraphs to the requirements. The Offeror’s Technical CRM may be identical to the one provided or revised to add information. For example, the Offeror’s Technical CRM may cross-reference its proposal volumes, paragraph numbers, and pages to specific solicitation requirements identified within the table, as well as other parts of the proposal that contain relevant information.

Table T-1 Cross Reference Matrix

Section L – Proposal Instructions Volume or Paragraph Numbers	Section L - Proposal Instructions Volume or Paragraph Title	RFP Sections (e.g. Sections F, H, and M)	SOO/SOW/PWS	Specification	CLIN	Government WBS
Volume 2	Technical					
2.1	Book A - Technical Subfactor 2					
2.1.1						
2.1.2						
2.1.n						
2.2	Book B - Technical Subfactor 2					
2.2.1						
2.2.2						

2.2.n						
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<Note to Drafter: Please tailor the CRM to each specific acquisition.>

This volume consists of two books: 1) TBD and 2) TBD. Please provide each book in a separate 3-ring binder. In this volume, provide the information described below:

Throughout the Technical Volume the Offeror should <Note to Drafter: Within this paragraph, delete the language highlighted in green related to strengths and incorporating them into the contract if Section M states that strengths will not be assessed> identify any proposed capability, approach or feature that exceeds a requirement or provides merit associated with a performance or operational benefit to the Government. The Offeror should also identify any proposed capability, approach or feature that reduces risk inherent in the program. Specifically, explain the benefits to the Government in technical terms and the degree of impact it will have to performance, operations and/or risk. Offerors are advised that any offer to exceed a requirement or to provide a feature with performance and/or operational benefits may be included in the resulting applicable Contract within the proposed cost/price.

<Note to Drafter: Add the paragraph below for design competitions.>

The Offeror shall demonstrate the extent to which its proposed capabilities will meet the requirements. The extent and the type of substantiation may vary, but each paragraph in the Technical Volume must be substantiated. The method of demonstration is at the discretion of the Offeror, however Offerors are advised that risk may be assessed based on the level of confidence that the Offeror provides the Government with its substantiating information. One method of demonstration is documented performance in an operational environment (an environment that addresses all of the operational requirements and specifications required of the system to include platform/packaging) or a simulated operational environment (a real environment that can simulate all of the operational requirements and specifications required of the system). Another method of demonstration is independent testing/evaluation in a non-operational (laboratory) environment (a simulated environment that allows for testing to determine if a system will meet the operational requirements and specifications of the system) at the system-level. The instructions below provide specific guidance for the type of demonstration. However, the Offeror is advised that application of this guidance is not a guarantee that the Offeror's demonstration will be deemed adequate or without risk. The burden of proof rests with the Offeror.

<Note to Drafter: For Design type contracts, there are typically 2 subfactors - 1) Technical Approach or Design Approach, and 2) Programs and Schedule, however the Subfactors must tie directly to the technical criteria listed in Section M. See example below. If there are no subfactors, then there are no Books and the paragraph numbering are streamlined accordingly.>

2.1 Design Approach – Book 1

Examples of areas to be addressed by the Offeror include: System architecture design, system performance, system design and qualification test, logistics & technology, integration & installation,

technical capability, product quality assurance and reliability, acquisition logistics support, and commonality.

2.2 Programs and Schedule – Book 2

Examples of areas to be addressed by the Offeror include but are not limited to: proposed SOW/CDRLS, program execution, schedule (IMS), IMP, risk assessment, management and mitigation plans, management approach, T&E, resources, hardware and software configuration management, software systems development, systems engineering management, and small business participation.

2.2.x Small Business Management

a. Small Business (SB) Utilization Strategy

All Offerors (Large and Small Businesses) shall address their strategies for utilizing SB Concerns in the performance of this contract, whether as a joint venture, teaming arrangement or subcontractor. SB Offerors may meet this requirement using work they perform themselves. For purposes of this solicitation, the term SB Concern shall also include the subcategories of Veteran-Owned Small Business (VOSB), Service-Disabled Veteran-Owned Small Business (SDVOSB), HUBZone Small Business (HUBZone), Small Disadvantaged Business (SDB), and Women-Owned Small Business (WOSB). Each subcategory of SB shall be addressed. This strategy is separate from, but shall be consistent with, the SB Subcontracting Plan, if such a Plan is required. Offerors are advised that while the SB Subcontracting Plan must be submitted to be eligible for award, the acceptability of the content of that plan is part of the responsibility determination assessment and not part of the evaluation. In describing its SB Utilization Strategy for this solicitation, the Offeror shall, as applicable:

- (1) Describe its approach to identifying SB Concerns;
- (2) Describe the extent of participation of SB Concerns on this contract, including a detailed description of the supplies and services for each SB Concern subcategory, and the complexity and variety of the work SB Concerns are to perform. For each SB Concern specifically identified in the proposal, provide the SB Concern's CAGE Code, or, if the SB Concern is not registered in the System for Award Management (SAM), at a minimum provide evidence of self-certification in accordance FAR 19.703(b) as an SB Concern. Where possible, provide documentation regarding enforceable commitments to utilize each SB Concern.
- (3) Identify what processes have been implemented to correct past inability to meet proposed goals and any validated improvements;
- (4) <Note to Drafter: Use this paragraph and the table when the Government is providing SB requirements as “goals” in the RFP>. Provide goals, expressed as dollars and percentages of total contract value and percentages of total subcontract value for SB Concerns and each subcategory of SB, using the format depicted below and provided electronically in Attachment X (Table X Small Business Goals). The Offeror shall provide Table T-X as part of Annex X entitled “Small Business Subcontracting Plan and Table T-X (Small Business Goals)”. This table does not replace the Subcontracting Plan requirements in FAR 19.7. Use tab 1 for the prime and tab 2 etc. for each first tier subcontractor as goals for each subcontractor must be listed separately. The Offeror’s response to this section shall simply be a reference to Annex X;

Table T-2 Small Business Goals

Offeror Name			
Total Proposed Contract Value (including options)	\$		
Total Amount to be Subcontracted	\$		
	\$ to be Subcontracted	% of Total Contract Value	% of Total Amount to be Subcontracted
Large Business			
Small Business			
Total			100%
Small Business Concern Subcategories (the sum of these small business subcategories will not necessarily equal the Small Business total above):	\$ to be Subcontracted	% of Total Contract Value	% of Total Amount to be Subcontracted
VOSB			
SDVOSB			
HUBZone			
SDB			
WOSB			

- (5) Describe its specific efforts and new, contract-specific initiatives to ensure the resulting contract meets or exceeds proposed goals. These efforts shall include, but are not limited to: sponsoring program specific outreach events and industry conferences, establishing Mentor-Protégé relationships and market research using websites such as the NAVAIR Office of Small Business Programs website (<http://www.navair.navy.mil/osbp>) and the Small Business Administration’s Dynamic Small Business Search tool (http://dsbs.sba.gov/dsbs/search/dsp_dsbs.cfm) to locate small business concerns; and

- (6) <Note to Drafter: remove this paragraph if the contract is a small business set-aside> Demonstrate (Large Businesses only) that its SB Utilization Strategy is consistent with its SB Subcontracting Plan. If the Offeror is a participant in the DoD Comprehensive Subcontracting Test Program specified in DFARS 219.7, or if the Offeror submits a Commercial Subcontracting Plan for this proposal, then the Offeror shall describe how SB participation on this contract will contribute to its overall Comprehensive or Commercial Subcontracting Plan goals.

<Note to Drafter: paragraph (c) is required for any procurement which has a strong developmental focus, relies upon complex or state-of-the-art technologies, or when the procurement program includes SBIR/STTR in the program's technology roadmap.>

b. SBIR Program – All Offerors (Large and Small Businesses) shall describe their research for utilization of technologies developed under the SB Innovation Research (SBIR) and SB Technology Transfer (STTR) Programs in the performance of the contract. The Offeror shall either:

- (1) In describing its SBIR/STTR utilization for this solicitation, as applicable: Identify relevant SBIR/STTR technologies and how they will be integrated into the proposed end item; Or,
- (2) If it is determined that SBIR/STTR technologies are not able to be utilized in the performance of the contract the Offeror shall, as applicable, describe the research conducted for relevant SBIR/STTR technologies including websites such as: <https://www.dodsbir.com/Awards/Default.asp>, <http://www.navysbir.com/database.html>, <http://www.virtualacquisitionshowcase.com> or events such as: The Navy Opportunity Forum and a brief assessment of their non-applicability.

3. **VOLUME 3 - PAST PERFORMANCE**

Note: This volume shall not contain any reference to the **cost or price** aspects of the offer.

The following is a list of Section L Attachments that the Offeror shall use to provide information for this volume:

Attachment **L-3** Past Performance Questionnaire (PPQ)
Attachment **L-4** Past Performance Contract Data (PP-1)

For this volume, the Offeror shall identify all relevant contracts (where for the purpose of these instructions the term contract also refers to delivery order or task order), or those portions of a relevant contract, whose performance is within **five** years of the proposal due date for the principal entities, identified in Table ES-1 (Offeror Summary). The relevant contracts provided for each principal entity shall be relative to its proposed role and responsibilities identified in Table ES-1 (Offeror Summary). **Commercial contracts may be included.** Offerors shall also identify relevant contracts within the past **five** years of the proposal due date that had any show-cause notices, cure notices, or termination for default. The Offeror shall complete Table ES-2 (Relevant Contract Summary For Past Performance **and Corporate Experience**) provided in Attachment L-1 (Executive Summary Tables), for all contracts proposed as relevant for Past Performance.

In Annex **X** (Final Versions of Previous Statement of Work (SOW)/Performance Work Statement (PWS)/Other Supporting Documentation for Past Performance **and Corporate Experience**), the Offeror shall provide electronic copies of the complete final versions of the SOW/PWS or other supporting solicitation/contract documentation from each contract or delivery/task order reference identified in Table ES-2 (Relevant Contract Summary). Annex **X** should only be provided in electronic format and should not be provided in paper copy. For contract references that contain delivery/task orders, additionally provide the work description for each specific delivery/task order. For contract references where the Offeror performed as a subcontractor, the Offeror shall also provide a complete electronic copy of the SOW/PWS or other documentation of the agreement between the prime and subcontractor that clearly defines the portions of the work effort of the Prime’s SOW/PWS that the Offeror performed as a subcontractor.

Contract Performance Assessment Reporting System (CPARS) and Questionnaires will be the primary customer feedback data used to evaluate the Offeror’s past performance. The Past Performance Information Reporting System (PPIRS) will be the primary method used to retrieve the CPARS for this source selection. For all contracts identified that do not have a CPARS, the Offeror shall forward a copy of Attachment **L-3** Past Performance Questionnaire to that contract’s Procuring Contracting Office (PCO), Administrative Contracting Officer (ACO), and Program Manager (PM); or commercial contractor equivalents. Please forward all questionnaires within **two** weeks from this solicitation’s release date to allow adequate time for the recipient to respond. Note that the Offeror should not reference this solicitation’s number when distributing the past performance questionnaires to customers. The Offeror should include instructions for the customers to send completed questionnaires within two weeks of its receipt via e-mail to the PCO/Contract Specialist, identified in 4.1 (Proposal Submission). The Offeror shall ensure that all points of contact are current and include an email address and phone number. The Offeror shall not conduct follow-up actions with regard to this

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questionnaire, other than to confirm receipt by the recipient. The Government may contact customers identified by the Offeror to obtain follow-up Past Performance Information as needed.

Offerors are reminded that the Government reserves the right to use information to evaluate past performance obtained from sources other than those identified by the Offeror. The Government may send additional questionnaires and/or obtain information from sources identified by the Government evaluation team.

3.1 Authorization Letter(s)

The Offeror should submit a signed “Release of Adverse Past Performance Authorization Letter(s)” with written consent from each principal entity (including JV team members), authorizing the release of adverse past performance information to the Prime. The signed letter(s) should be included in a separate tab within Volume 3 (Past Performance). This authorization letter allows the Government to coordinate past performance issue(s) with the Prime Offeror. For any principal entity (including JV team members) that does not provide an authorization letter with such written consent, the Offeror shall provide point of contact information for each principal entity. This contact information shall include a name, address, phone number, and email address (including JV team members), with whom the Government may coordinate any issues and obtain responses as needed. Offerors are advised that if it does not submit the Release of Adverse Past Performance Authorization Letters with written consent, then the Government will address any past performance issues directly with the principal entity (including JV team members), and the Offeror will forfeit the opportunity to participate in any related discussions.

3.2 Relevant Contract Data

For each contract identified for past performance in Table ES-2 (Relevant Contract Summary) provided in Attachment L-1 (Executive Summary Tables), the Offeror shall complete Attachment L-4 Table PP-1 (Past Performance Contract Data), according to the instructions within the attachment and submit it within this section and as a separate electronic file. Please note that this form is a summary of the principal entities’ relevant contract data. All detailed information and comparative analysis of the past performance contract references to this solicitation’s requirements shall be provided in Volume 3 (Past Performance), Section 3.3 (Evaluation), of the Offeror’s proposal. The contract references designated in Table ES-2 (Relevant Contract Summary) shall be used in completing Volume 3 (Past Performance) and all contract references shall be numbered the same throughout all of the Offeror’s proposal volumes (i.e., the contracts identified as P1, S1, T1, C1 etc.)

If a contract has D.O.s/T.O.s, provide a separate contract reference and separate PP-1 tab for each D.O./T.O. The Offeror may use one reference number/PP-1 tab for multiple D.O.s/T.O.s if they are the same work effort and performed under the same CPAR; however, identify the dollar amount and period of performance for each. Do not provide a contract reference to the basic contract.

In general, recent performance will be considered a better indicator of future performance. If the Offeror is proposing as a JV, the Offeror should provide the relevant contracts for the JV as a whole, and for each team member of the JV. **Contracts detailed in the Corporate Experience Volume shall be**

the same as those in this Volume, although there may be more relevant contracts applicable to this Volume than those identified in the Corporate Experience Volume.

Table PP-1 Past Performance Contract Data

Offeror Name:		
1	Entity Name	
2	Contract Reference	
3	Title of Contract	
4	Contract Number	
5	Contract Type	
6	Relevant Delivery/Task Order Numbers (if applicable)	
7	Subcontract Number/PO Number	
8	Procuring agency	
9	Description of product or service	
10	Period of performance – Start Date	
	Period of performance – End Date	
11	CAGE Code (if not the same as Offeror, explain)	
12	Dollar value of contract (Total)	
	Dollar value of contract (Annualized)	
13	Brief Work Description and/or Program Responsibility for this past contract. <Note to Drafter: List the attributes to be considered in relation to scope, magnitude, and complexity>	
	a. PWS/SOW paragraphs from contract reference associated with Attribute a	
	b. PWS/SOW paragraphs from contract reference associated with Attribute b	
	n. PWS/SOW paragraphs from contract reference associated with Attribute n	
14	Date of last completed CPARs	
15	Date past performance questionnaires were sent	
16	Points of Contact who can validate performance on the past performance contract, specific delivery order or task order number referenced above.	
17	Gov't PCO or Commercial Purchasing Agent	Name:
		Phone:
		Email:
18	Gov't ACO	Name:
		Phone:

		Email:
19	Gov't PM or Commercial PM	Name:
		Phone:
		Email:
20	Other:	Name:
		Title:
		Phone:
		Email:

3.3 Evaluation

The burden of providing thorough and complete past performance and systemic improvement information remains with the Offeror.

For each contract identified in Attachment L-4 Table PP-1 (Past Performance Contract Data), the Offeror shall provide contract data regarding relevancy, past performance information, demonstrated systemic improvement, earned value data, and award fee as described below, organized by contract reference. As this information is presented in the proposal, demonstrate the relevancy of the principal entities past performance with respect to this solicitation’s requirements. For any contract references where the principal entities are aware of problems, the Offeror shall describe the issues in section 3.3.b (Past Performance Information). For each past performance problem identified, describe the status of the systemic improvement efforts in section 3.3.c (Demonstrated Systemic Improvement).

- a. **Relevancy:** Offerors are required to explain what aspects of the referenced contracts are deemed relevant, as defined by Section M, to this solicitation’s requirements. To demonstrate relevancy, Offerors shall provide a comparative analysis to the scope, magnitude, and complexity or similarity of this solicitation’s requirements. Within the comparative analysis, Offerors should identify the relevant portions (sections, paragraphs, and page numbers) of the referenced contract’s SOW/PWS (Annex X) to clearly identify how past efforts performed are similar to this solicitation’s requirements. In addition, the referenced sections only need to be identified and the full text does not need to be broken out separately from the complete SOW/PWS.

The reference contract(s) provided should be relative to each principal entity’s proposed role/responsibility identified in Table ES-1 (Offeror Summary) versus relative to the whole solicitation. For example, a subcontractor who is being proposed to perform only software has a past contract whose total work is software. Even though the software effort is only 10% of the hypothetical solicitation’s effort, the previous contract relates to 100% of the subcontractor proposed effort for the hypothetical solicitation and therefore the reference contract would be considered Very Relevant vice Somewhat Relevant.

For a discussion on CAGE Code/DUNS, refer to section 1.0 Volume 1 (Executive Summary). Offerors should be advised that the CAGE Code/DUNS for each referenced contract is considered as part of the Relevancy determination, which determines if the contract reference will be included in the Past Performance and Corporate Experience evaluations. Note: Any information regarding CAGE Code/DUNS should be included within Volume 1 (Executive Summary) and does not need to be repeated here.

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Offerors are advised that contracts assessed as not relevant by the Government will not be considered in the Past Performance **or Corporate Experience** assessments.

- b. **Past Performance Information:** For the relevant contracts provide a brief description of past performance in delivering quality services. Include in these descriptions any information that demonstrates the level of performance obtained, where available; provide quantifiable measures/trends to demonstrate past and current performance. Also describe past problems, including when they occurred, what the circumstances were surrounding the situation, and what the consequences were as a result of the problem.

For Small Business Utilization, the Large Business Offeror shall provide copies of the final or most recent SF 294s/Individual Subcontracting Reports (ISRs) for the three most relevant Government contracts provided in the Past Performance section of its proposal. The Small Business Offeror may provide this information in a format substantially the same as the ISR. If the Offeror is a participant in the DoD Comprehensive Subcontracting Test Program, the Offeror shall provide copies of DCMA's most recent “Review of Contractor's Comprehensive Subcontracting Program” (DCMA Form 640), and three final or most recent SF 295s/Summary Subcontracting Reports (SSRs), and explain how the results shown in these documents demonstrate the feasibility of the Offeror’s proposed SB Utilization Strategy. If applicable, note whether the contract met or exceeded Small Business (SB), Veteran-Owned Small Business (VOSB), Service-Disabled Veteran-Owned Small Business (SDVOSB), HUBZone Small Business (HUBZone), Small Disadvantaged Business (SDB), and Women-Owned Small Business (WOSB) small business utilization and subcontracting goals. All Offerors providing this information must explain how this information translates to reasonableness of their proposed SB Utilization Strategy goals provided in the technical Volume.

- c. **Demonstrated Systemic Improvement:** Identify systemic improvement actions taken to resolve any past problems identified in **3.3.b** (Past Performance Information). Provide the records of such results and indicate where they are documented, preferably in Government record systems. Describe the techniques, elements, and tools used to correct problems on the reference contract and, if applicable, how these techniques, elements, and tools may be used for the contract to be awarded as the result of this solicitation. Provide quantifiable evidence or metrics that substantiate or demonstrate claims of improvement and to demonstrate that the past problem will not occur on the contract to be awarded as the result of this solicitation. It is incumbent upon the Offeror to explain the relevance of the data provided and substantiate that improvements from past performance problems are being made. The Government does not assume the duty to search for data to cure the problems it finds in the information provided by the Offeror. Consideration for discounting problems may be given when those problems are addressed through demonstrated systemic improvement. Demonstrated systemic improvement may be indicated by information as it relates to preventing recurrence of past problems, including: identification of the root cause of a problem, a corrective action plan that systemically addresses the past problem, how and when the plan was implemented, documented timeframe to demonstrate when corrective action was implemented and became successful; and performance data, preferably through Government records, to show performance improvements. With regard to performance improvement data, explain the likelihood to which the problem will not reoccur on during the performance of this

prospective contract based on the amount of time that good performance was sustained in consideration of the nature of the past problem and effort.

d. Earned Value :

The Offeror shall provide Earned Value management System Information as follows:

- i. Provide earned value data generated for previous contracts (or documented work efforts) such as the latest or final Contract Performance Report Format I with variance, Cost Performance Index, and Schedule Performance Index. Identify if there were any Over Target Baselines or restructures, (when occurred and the dollar value) and how performance data was impacted. For CPAR data, explain significant differences between earned value measure and CPAR rating, e.g., Exceptional CPAR rating under Schedule and SPI of 0.85.
- ii. Provide the total program’s earned value data in accordance with the provided table containing by month and year the Cumulative Budgeted Cost for Work Scheduled (BCWS), Cumulative Budgeted Cost for Work Performed (BCWP), Cumulative Actual Cost of Work Performed (ACWP), Budget at Completion (BAC), Total Allocated Budget (TAB), Management Reserve (MR) and Latest Revised Estimate (LRE) in accordance with the table below. The table is to be provided electronically in Microsoft Excel 2010 or compatible. The table is to contain available data from first reported month through the last reported month. Unless no work was subcontracted, a second table will be provided as described containing the Prime Contractor’s EVM data only.

	Project (Contract/Clin #)						
	CUM BCWS	CUM BCWP	CUM ACWP	BAC	TAB	MR	LRE
Month 1/ Year 1							
Month 2/ Year 1							
Month n/ Year n							

- i. Provide a list of any Defense Contract Management Agency (DCMA) issued Earned Value System Correction Action Reports (CARS) identified within the past five years and describe how these items are being corrected or were corrected prior to award of this contract.
 - ii. Describe any cost overruns including those before re-baselining. Identify the amount of the overrun in percentage and in dollars. Provide an assessment of the applicability to your proposed approach and the potential cost impact it could have on this program.
- e. **Award or Incentive Fee:** Provide a summary of the award fee available and earned for each evaluation period over the past three years of an on-going contract, or last three years of a completed contract (both in dollars earned and percentage of available award fee received).

4. VOLUME 4 – CORPORATE EXPERIENCE:

Note: This volume shall not contain any reference to the cost or price aspects of the offer.

The following is a list of Section L Attachments that the Offeror shall use to provide information for this volume:

Attachment L-5 Table CE-1 Applicable Contracts for Each Corporate Experience Element

<NOTE TO DRAFTER: Table CE-1 should include all of the Governments references for which the contractors SOW/PWS or other supporting solicitation/contract documentation will be compared to in the evaluation. Include specific SOO/SOW/PWS, Specification, CLIN, WBS or other contract data (e.g., number of aircraft, maintenance cycles, supply support functions, NAMP programs managed).>

The Offeror shall complete Table CE-1 (Applicable Contracts for Each Corporate Experience Element) below, provided in Attachment L-X, according to the instructions within the attachment, and submit it as the first section of Volume 4 (Corporate Experience) and as a separate electronic file. Within Table CE-1 (Applicable Contracts For Each Corporate Experience Element) the Offeror shall identify the relevant portions (sections and paragraphs) of the contract reference’s SOW/PWS or other supporting solicitation/contract documentation to clearly identify how Corporate Experience performing past tasks are similar to evaluation elements 4.1.1 through 4.1.n. If the Offeror performed as a subcontractor for a contact reference, identify relevant portions (sections and paragraphs) of the SOW/PWS or other documentation of the agreement between the prime and subcontractor. Only contract references designated in Table ES-2 (Relevant Contract Summary) shall be used in completing this Volume and all contract references shall be numbered the same throughout all of the Offeror’s proposal volumes (i.e., the contracts identified as P1, S1, T1, etc.). < NOTE TO DRAFTER If the number of years evaluated for Corporate Experience is different than Past Performance, delete the next sentence.> All contracts evaluated for Corporate Experience will also be evaluated for Past Performance. However, not all past performance contract references need to be used by the Offeror to demonstrate Corporate Experience and therefore do not need to be identified in this volume.

Table CE-1 Applicable Contracts for Each Corporate Experience Element

1	Offeror Name	
2	Entity Name	
3	Contract Reference	
4	Title of Contract	
5	Contract/TO/DO/Subcontract Number	
6	4.1.1 (Element Name)	Applicable PWS/SOW Section/Paragraph from Contract Reference Applicable to 4.1.1 (Element Name)
	(1) Government Reference	
	(2)	
	(3)	

4.1.2 (Element Name)	Applicable PWS/SOW Section/Paragraph from Contract Reference Applicable to 4.1.2 (Element Name)
(1)	
(2)	
(3)	
4.1.n (Element Name)	Applicable PWS/SOW Section/Paragraph from Contract Reference Applicable to 4.1.n (Element Name)
(1)	
(2)	
(3)	

For this Volume, the Offeror shall identify relevant contracts, or those portions of a relevant contract, whose performance is within **five** years of the proposal due date and contains efforts similar to those efforts required by this solicitation for the principal entities identified in Table ES-1 (Offeror Summary). The experience provided shall only relate to Corporate Experience, which is the experience gained through contracted work. The experience of the principal entities personnel or any personnel will not be considered in this Corporate Experience evaluation. If proposing as a JV team, Offerors should include the Corporate Experience of the JV as a whole, as well as the Corporate Experience for each JV team member. In general, more recent Corporate Experience will be considered a better indicator of future performance than older Corporate Experience.

Corporate experience information provided shall be: for similar programs/contracts (as defined in section **4.1** (Evaluation Elements)); at the same physical location (e.g., with the same CAGE code/DUNS) as referenced in Table ES-1 (Offeror Summary); and related to the roles and responsibilities identified in Table ES-1 (Offeror Summary). For example, if a principal entity is assigned to perform Non-Destructive Test/Inspection and submits information regarding software development, the software development experience would not be relevant as it was not proposed as an assigned role/responsibility for the principal entity.

For a discussion on CAGE Code/DUNS, refer to Section 1.0 Volume 1 (Executive Summary). Offerors should be advised that the CAGE Code/DUNS for each referenced contract is considered as part of the Relevancy determination, which determines if the contract reference will be included in the Past Performance and Corporate Experience evaluations. Note: Any information regarding CAGE Code/DUNS should be included within Volume 1 (Executive Summary) and does not need to be repeated here.

Contract relevancy will be determined in the Past Performance evaluation. Only contract references identified in the Volume **4** (Corporate Experience) and determined relevant in the past performance evaluation will be evaluated in Corporate Experience.

4.1 Evaluation Elements

The Offeror shall provide a comparative analysis between the principal entities’ roles and responsibilities identified in Table ES-1 (Offeror Summary) and the Corporate Experience requested in

subparagraphs 4.1.1 through 4.1.n. In a paragraph to a page per contract reference, for each element in 4.1.1 through 4.1.n below, describe the extent to which previous Corporate Experience performing requirements similar to this solicitation can be leveraged in future performance of work. Similarity is the extent to which the Offeror’s contract references (or documented work efforts) correspond to the specific tasks required by this solicitation. At a minimum, address the specific items within each element, however, when drafting each element description, consider the contract reference’s period of performance, the amount of time in performance, recency of the performance, frequency of the applicable activities, the technical nature of the work in comparison to the proposed effort, and the entity’s proposed role and responsibility.

4.1.1 Management, including Program Management and Subcontractor Management Experience.

- a. The Offeror shall describe its Corporate Experience in management, including acting as the prime contractor, providing Program Management and Subcontractor Management of programs with similar type of work, scope of effort and complexity with respect to the solicitation. Describe any long-term support agreements enacted with proposed principal entities. Referenced contracts should be supplied for the Prime only.
- b. The Offeror shall describe the extent to which its proposed management team and its principal entities have previously worked together to deliver products. Where possible, include examples of programs that have been managed by the same program management team and/or program manager proposed for this program. Referenced contracts should be supplied for the Prime only.
- c. Describe the extent to which the principal entities’ have worked with Government and NAVAIR program teams and contracting teams. Referenced contracts should demonstrate Corporate Experience for each entity.

4.1.2 Evaluation elements (as specified in Section M, Corporate Experience Evaluation Factor).

4.1.n Additional Evaluation elements as required.

5. VOLUME 5 – COST/PRICE

<NOTE TO DRAFTER> The following are examples to the Drafter for consideration: Hybrid type contract (has Cost type (Cost-Plus Fixed Fee (CPFF)) and Price type (Firm Fixed Price (FFP)) CLINs) with cost realism analysis and price reasonableness for a Design and Development Program with a single factor and a FFP for a Trainer CLS program with Labor Hours and Travel/ODC Cost CLINs)

Development Program with Both CPFF & FFP CLINs and a Single Factor Example:

5.1 General Information

The following is a list of the Section L Cost Attachments that the Offeror shall utilize to provide cost information as required for this Volume:

Section L, Attachment C-1 Cost Attachments, which includes the following:

Cost Attachment 1 (CA-1)	Program Work Breakdown Structure (PWBS) and PWBS Dictionary
Cost Attachment 2 (CA-2)	Cost Cross Reference Matrix (CRM)
Cost Attachment 3 (CA-3)	*** <Contract Name> DD Form 2794 CSDR Contract Plan
Cost Attachment 4 (CA-4)	*** <Contract Name> Resource Distribution Table (RDT)
Cost Attachment 5 (CA-5)	Modified DD Form 1921 Example
Cost Attachment 6 (CA-6)	Summary of Cost and Hours by WBS (Modified 1921-1)
Cost Attachment 7 (CA-7)	Cost Substantiation
Cost Attachment 8 (CA-8)	Software
Cost Attachment 9 (CA-9)	Systems Engineering/Program Management
Cost Attachment 10 (CA-10)	Skill Mix/Composite Direct Labor Rate
Cost Attachment 11 (CA-11)	Recurring Hardware Information
Cost Attachment 12 (CA-12)	Government Furnished Equipment (GFE) /Property /Facilities /Information List

All costs shall be contained in RFP Section B, *** <Insert As Applicable> (see Section ___ Model Contract), Annex ___ (Small Business Subcontracting Plan), and the cost/price proposal. The Government is required to evaluate each proposal relative to the cost/price criteria submitted in response to Section M. Proper presentation and adequate supporting documentation will ensure the cost proposal is efficiently evaluated and all assumptions are understood. **The burden of proof for cost credibility rests with the Offeror.**

The information required in these cost instructions applies to both the Offeror and to any *** <Section L General Section should contain definition, else define here> Principal subcontractors required to meet the requirements of this solicitation, as defined in paragraph one (1) of the General Proposal Instructions. Due to the proprietary nature of company rates, rate information may be presented separately for each Offeror and principal subcontractor. Each principal subcontractor that provides a separate volume shall follow the same format as described in these instructions.

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In developing the cost/price proposal, the Offeror shall develop a *** <If first usage, spell out> CWBS and CWBS Dictionary that aligns to the Government provided Program Work Breakdown Structure (PWBS) contained in Cost Attachment 1. Tailoring of the CWBS is encouraged and allowed at levels below the PWBS to reflect the Offeror's specific design.

The Government is not soliciting any Offeror investments. However, in order to properly assess a proposed cost/price that appears low or decreases program costs due to a corporate decision to absorb costs (e.g., company investment or management challenge or a contribution of resources and/or equipment), the Offeror shall fully identify and explain any such investments. Additionally, the Offeror shall propose an H-clause that clearly identifies what equipment and/or material, and the associated data and data rights that are conveyed to the Government, and that also specifically states the fiscal adjustment(s) and identifies the Offeror's liability in Volume 5 Section 5.3.1, Ground Rules and Assumptions, and in *** <Insert proper reference and title> Volume 6, Terms & Conditions, Assumption and Exceptions or Deviations, of its proposal. At the discretion of the PCO, this may be a contractually binding clause.

Additionally, any adjustments shall be clearly described in the Ground Rules and Assumptions portion of the Offeror's Summary of Estimating Methodology (see paragraph 5.3.1). Any adjustments must be cross-referenced to the Offeror's CWBS, CLIN, SOW and IMS. The estimate must be easily traceable from the level at which the Offeror's estimate was substantiated to the CLIN.

The proposal provided by the Offeror will follow the format provided in paragraph 5.3, Cost Proposal Instructions.

5.2 Cost Proposal Guidelines

The Offeror shall ensure consistency between the information/data in this Volume and that provided in the Technical Volume. The Offeror's Cost Proposal should trace to the proposed *** <Update As Applicable, e.g., Technical Volume requests non-resource loaded Schedule> Integrated Master Plan (IMP) and Integrated Master Schedule (IMS). Identify the IMP/IMS unique identification number to trace to the proposed CWBS resources in CA-2 Cost Cross Reference Matrix (CRM) (see outline in paragraph 5.3 below).

Cost information shall be submitted in Then- Year dollars (TY\$) based on the Government's fiscal year (1 October through 30 September) with the escalation formula provided for each year. The Offeror shall provide a summary level of the Cost Proposal in Constant Fiscal Year *** <Update As Applicable, Program of Record or FY of source selection; helps validate escalation used in proposal> 2017 dollars (FY17\$) by Fiscal Year and CWBS using escalation/de-escalation factors supported by their rates and factors used in their cost proposal. Please provide this summary based on a Level 2 CWBS <Insert As Applicable, e.g., when using MIL-STD-881C Appendix B> plus Level 3 for elements within Prime Mission Product.

Offeror provided Cost Attachments are acceptable in lieu of entering data on established Government forms; on the condition they include the same information as the established Government forms.

The Offeror shall prepare and submit the cost proposal narrative substantiation and rationale in ******* **<Update As Applicable> MS Microsoft Word 2010** format and any numerical data in a **Microsoft Excel 2010** format on CD-ROM. Files received in a format other than requested are unacceptable. Portable Document Format (PDF) is not acceptable, except when provided in addition to Microsoft Word or Excel formats. Within all Excel spreadsheets, the Offeror shall use formulas and functions to the maximum extent possible and avoid using "value only" cells. If external links are utilized, supply those referenced files. The cost proposal shall be unprotected and unlocked, with formulas intact to show mathematical operations. Ensure that the electronically submitted filenames are directly traceable to the hard copy submittals.

5.3 Cost Proposal Instructions

The proposal provided by the Offeror shall follow the format below:

Section 1 – Technology Maturation and Risk Reduction (TMRR) Cost

- 1.1 – Programmatic Information
 - 1.1.1 – System Description
 - 1.1.2 – Ground Rules and Assumptions
 - 1.1.3 – CWBS and CWBS Dictionary
 - Cost Attachment 1, Program Work Breakdown Structure (PWBS) and PWBS Dictionary
 - 1.1.4 – TMRR Cost and Software Data Reporting (CSDR) Plan
 - Cost Attachment 3, DD Form 2794 CSDR Contract Plan
 - 1.1.5 – TMRR Resource Distribution Table (RDT)
 - Cost Attachment 4, Resource Distribution Table (RDT)
 - 1.1.6 – Level of Effort (LOE) Work Years (WYs) by Year
 - Cost Attachment 9, SE/PM WY Level of Effort (LOE) Staffing Matrix
 - 1.1.7 – Subcontracts, Interdivisional transfers
 - 1.1.8 – Special Tooling and Special Test Equipment (ST/STE)
- 1.2 – Summary of Estimating Methodology
 - Cost Attachment 2, Cost Cross Reference Matrix
- 1.3 – Cost Summaries
 - 1.3.1 –DD Form 1921
 - Cost Attachment 5, Modified DD Form 1921
 - 1.3.2 –DD Form 1921-1
 - Cost Attachment 6, Summary of Cost and Hours by WBS (Modified 1921-1)
- 1.4 – Detailed Estimating Methodology
 - 1.4.1 – Labor
 - Cost Attachment 7, Cost Substantiation
 - 1.4.2 – Software Form
 - Cost Attachment 8, Software
 - 1.4.3 – Material
 - Cost Attachment 7, Cost Substantiation
 - Cost Attachment 11, Recurring Hardware Information
 - 1.4.4 – Other Direct Charges/Travel

Cost Attachment 7, Cost Substantiation

1.5 – Profit or Fee

Section 2 – Engineering Manufacturing Development (EMD) Cost

2.1 – Programmatic Information

2.1.1 – System Description

2.1.2 – Ground Rules and Assumptions

2.1.3 – CWBS and CWBS Dictionary

Cost Attachment 1, Program Work Breakdown Structure (PWBS) and PWBS Dictionary

2.1.4 – Level of Effort (LOE) Work Years (WYs) by Year

Cost Attachment 9, Systems Engineering/Program Management

2.1.5 – Subcontracts, Interdivisional transfers

2.1.6 – Special Tooling and Special Test Equipment (ST/STE)

2.2 – Summary of Estimating Methodology

Cost Attachment 2, Cost Cross Reference Matrix

2.3 – Cost Summaries

2.3.1 –DD Form 1921

Cost Attachment 5, Modified DD Form 1921

2.3.2 –DD Form 1921-1

Cost Attachment 6, Summary of Cost and Hours by WBS (Modified 1921-1)

2.4 – Detailed Estimating Methodology

2.4.1 – Labor

Cost Attachment 7, Cost Substantiation

2.4.2 – Software Form

Cost Attachment 8, Software

2.4.3 – Material

Cost Attachment 7, Cost Substantiation

Cost Attachment 12, Recurring Hardware Information

2.4.4 – Other Direct Charges/Travel

Cost Attachment 7, Cost Substantiation

2.5 – Profit or Fee

Section 3 – Low Rate Initial Production (LRIP) Price

3.1 – Cost Summaries

Cost Attachment 5, Modified DD Form 1921 Example

Cost Attachment 6, Summary of Cost and Hours by WBS (Modified 1921-1)

3.2 – Ground Rules and Assumptions

Cost Attachment 11, Recurring Hardware Information

3.3 – Price Information

Cost Attachment 2, Cost Cross Reference Matrix

Section 4 – Contractor Rates

- 4.1 – Direct rates
 - 4.2.1 – Direct Labor Rate
 - 4.2.2 – Skill Mix
 - Cost Attachment 10, Skill Mix/Composite Direct Labor Rates
- 4.2 – Indirect rates
- 4.3 – Cost to Sell Equations
- 4.4 – Escalation

Section 5 – Other Cost/Price Impacts

Section 6 – Government Furnished Equipment / Property / Facilities / Information

Cost Attachment 12, Government Furnished Equipment / Property / Facilities / Information List

***** <Insert As Applicable from PCO or Contracts Specialist, if Model Contract> Section 7 - Administrative**

5.3.1 Specific Instructions for Section 1 TMRR Cost and Section 2 EMD Cost

The following instructions apply to Sections 1 and 2 contract costs. For conciseness, instructions for each of these sections are shown below once. Offeror is expected to follow the instructions in each section and number according to the outline provided in Section 5.2 above.

Adequate substantiation is necessary for the Government to evaluate the cost and scope of the Offeror's estimate for realism and completeness, and to ensure all SOW requirements are included in the cost proposal. The Offeror shall provide substantiation at the lowest CWBS level at which the Offeror's estimate was developed.

The Government will evaluate the technical and estimating approach of all proposals and perform an independent assessment of each Offeror. The assessment will address the sum of the resources required to realistically conduct the program proposed by the Offeror. Of primary importance to this process are the Offeror's actual expenditures for tasks comparable to those found in the CWBS and CWBS Dictionary and historical data from analogous efforts. Where this is not provided/available, the Government may consider historical data from previously executed programs, for example, historical data contained in the NAVAIR ESLOC Model (NEMO) tool, and/or the judgment of members of the Source Selection Team.

In all cases, documentation is required for each Offeror's CWBS element priced out for the Offeror's SOW contained in the proposal, which shall provide the basis of estimate for labor, material, and purchase components. If there is any information requested that does not apply to the Offeror's proposal (e.g., non-recurring, manufacturing) then indicate with the letters 'NA' (Not Applicable) on any forms where a space is provided for that.

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The following guidelines and sample formats/attachments are provided to assist the Offeror in preparing clear, concise, comprehensive, and traceable proposals.

The Offeror shall cost the CWBS and ensure that it is cross-referenced to the proposed SOW, CLIN, and *** <Update As Applicable, e.g., Technical Volume requests non-resource loaded Schedule>IMS. All totals should agree. Substantiation should be provided at the lowest level for which the Offeror developed estimates. Ensure consistency between the information/data in this Volume and that provided in the Technical Volume. Specifically, ensure the resources identified in the IMP and IMS are consistent with the costs proposed in this Volume and the basis for those estimates.

Historical data from comparable or analogous systems/subsystems should be used to substantiate the Offeror's estimate where possible. When using historical cost data from comparable systems/subsystems, all assumptions affecting the Offeror's cost proposal are to be fully documented (e.g., escalation methodology, make or buy decisions, etc.). A summary programmatic and technical description of the historical system should be provided along with the actual cost data for the historical system, a comparison to the proposed system, and any adjustments made to derive the proposed estimate. The following shall be considered:

- 1) Programmatic description related to the acquisition aspects of any system identified by the Offeror as comparable/analogous. This includes, for example, the years the item was procured, production rates, quantities procured by year and definition of system composition, sole source or competitive procurement, and the development time period.
- 2) Technical description including the performance and physical aspects of the system. This describes the system in terms of the number of parts, physical configuration, type of material, technology, and physical/performance parameters.
- 3) Actual cost data including the cost account, narrative description of the effort, and the actual cost data (material and person-hours). The cost data should be provided in terms of total dollars actually spent by fiscal year and unit cost.
- 4) When using historical data, the Offeror should describe why the system is comparable to the proposed program. This includes a functional and technical comparison explaining the differences as well as similarities between the historical and the proposed system. Also include an explanation of the relationship between the analogous element cost and the total program cost.
- 5) Adjustments made to derive the proposal estimate. The Offers should provide reasons and justification for any adjustments made to programmatic, technical and actual cost data for the historical system. The Offeror should provide the basis and document any adjustments applied to the historical data (e.g., complexity factors and normalization methods), which reflect the characteristics of the proposed system. This includes an audit trail sufficient for the Government to reconstruct the proposed estimate and judge its credibility.

General statements such as estimates were derived from engineering analysis or judgments are unacceptable without substantiating information. If a level of effort task is the basis for projecting labor hour requirements, the data substantiation shall include task duration, man-loading, number of times the task is repeated (if applicable), time-phased hours and associated costs, and the relationship between the historical system and the system under review. If a "new or improved" engineering or manufacturing process is the basis for projecting labor hour requirements, the Offeror shall provide a

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description of the improvements, the relationship to the previous process, a summary of how these improvements will be achieved, and the cost impact of these improvements. General statements about process improvements, management by Integrated Product Team, the application of Acquisition Reform and Lean Six-Sigma/Airspeed, etc., will not be sufficient without substantiating data. Specific savings in person-hours and material must be documented with regard to the content and practicality of these improvements. Adjustments made to the historical data to normalize for changes in the accounting system, business base, or inflation rate should be substantiated.

5.3.1.1 Programmatic Information

5.3.1.1.1 System Description

Provide the following technical information for the proposed system and each proposed source data of each historical system used for analogy or parametric estimation.

- 1) Hardware Overview – An identification of the major hardware components within the proposed system. Also identify each component by material composition, prime/principal subcontractor, and make versus buy status.
- 2) Software Overview – An identification of the Computer Software Configuration Items (CSCIs), tracing the requirements allocated to the system specification for each CSCI and its associated Computer Software Component(s) (CSCs).
- 3) System Test and Evaluation Overview – identify the purpose and function of each test, its SOW reference, and the source - prime or subcontractor - of the test component.
- 4) Integrated Logistics Support (ILS) Overview – An identification of the support components required for the system (training, support equipment, site specific support, initial spares and repair parts, etc.). Identify the interim support plan and the planned maintenance concept based on the design and any efficiency built into the design, as applicable.

5.3.1.1.2 Ground Rules and Assumptions

Provide an explanation of all ground rules and assumptions that affect the cost estimates. Topics to be addressed must include, but are not limited to, technical and programmatic requirements, business base, the basis (source) of labor and overhead rates, investments, cost-sharing arrangements, make/buy decisions, prime/subcontractor relationships and inflation/escalation. Label clearly all tables and charts. All calculations shall obey standard mathematical principles - numbers shall be correctly added, subtracted, etc. General information should be provided in this subsection, with specifics addressed in the appropriate section/subsection.

5.3.1.1.3 CWBS and CWBS Dictionary

The CWBS and CWBS dictionary shall be developed in accordance with the WBS structure found in MIL-STD-881C *** <Update for appropriate -881 Appendix> (Appendix B: Electronic/Automated Software System), current edition. Work breakdown structure is required to align with the Government provided Program WBS (PWBS) structure in Cost Attachment 1 and the DCARC approved ***

<Update for program title> ___ Program CSDR Plan in *** <Insert As Applicable, where providing copy of DCARC approval letter with 2794 form attached> Section J, Attachment (___) (see Section 5.1 General Information). The Offeror shall expand the CWBS as necessary and develop the CWBS Dictionary for its proposal to a minimum of Level 2 CWBS *** <Insert As Applicable, e.g., when using MIL-STD-881C Appendix B> plus Level 3 for elements within Prime Mission Product.

For Section 1 TMRR Costs, the CWBS must agree with the TMRR CSDR Contract Plan developed in Section 5.3.1.1.4, Cost and Software Data Reporting (CSDR) Plan. Any expansions, element name updates, or element order changes to the CWBS elements from the developed contract CSDR plan shall be reflected in the CWBS and CWBS Dictionary.

5.3.1.1.4 TMRR Cost and Software Data Reporting (CSDR) Plan

The Offeror shall provide an TMRR CSDR Contract Plan using the sample provided in Cost Attachment 3. The Offeror shall mark any WBS elements that are not applicable “N/A”, and update the Software Resources Data Reporting (SRDR) column to have an “X” in all WBS elements that have software. Additional instructions for updating CSDR Contact Plans may be found on the Defense Cost and Resource Center (DCARC) website <http://cade.osd.mil/#Forms>. NOT APPLICABLE TO SECTION 2 EMD COSTS.

5.3.1.1.5 TMRR Resource Distribution Table (RDT)

The Offeror shall provide a TMRR Resource Distribution Table (RDT) using the sample provided in Cost Attachment 4 for an overview of contract and contractor/sub-contractor scope. Provide the name and address of major subcontractors and lower-tier subcontractors that may meet the CSDR thresholds along with the specific WBS elements for which they are responsible. Additional instructions for populating the RDT may be on the DCARC website <http://cade.osd.mil/#Forms>. NOT APPLICABLE TO SECTION 2 EMD COSTS.

5.3.1.1.6 Level of Effort (LOE) Work Years (WYs) by Year

Provide all Contractor and subcontractor WYs for Systems Engineering/Program Management (SEPM) in Cost Attachment 9, SE/PM WY LOE Staffing Matrix.

5.3.1.1.7 Subcontracts, Interdivisional Transfers

In order to show the prime Contractor’s analysis of subcontractors’ pricing, provide a list of anticipated subcontracts and interdivisional transfers. Identify the following by CLIN and by Government Fiscal Year (GFY).

- 1) The supplier
- 2) Description of the item, services, or quantity of hours
- 3) Type of contract
- 4) Subcontractor’s quoted and prime Contractor’s adjusted subcontract values. Explain any differences between the subcontractor's quoted cost and the subcontract cost proposed by the prime.

5.3.1.1.8 Special Tooling and Special Test Equipment (ST/STE)

Provide a list of all ST/STE needed to fulfill the requirements of each phase of the program and the proposed cost for each piece of ST/STE, which is not considered Capital Equipment and will be procured. This list should identify which CWBS element the tooling/test equipment supports, as well as identify the maximum capacity of each ST/STE. Show the ST/STE acquisition costs including any set-up, installation, and shipping costs for the Offeror and principal subcontractors as applicable.

5.3.1.2 Summary of the Estimating Methodology

In this section the Offeror shall provide an overview of the process used to develop the cost proposal. This will include, at the minimum, a summary of the approach used to estimate labor hours and a description of the process used to obtain vendor quotes for purchased equipment and/or material. It will also include a traceability matrix or table that shows the link between the labor hours and material costs included in the cost summaries and those in the detailed labor and material sections. Similar information shall be provided to show traceability between the prime and subcontractor sections.

To support the proposal, the Offeror shall provide discussion of the pricing methodology to address why the Offeror’s proposed cost is realistic, including such factors as commonality with other programs, commercial sources, advantages of quantity buys, etc.

Provide a CWBS/CLIN/SOW/IMS Cross Reference Matrix. The Offeror shall cost its CWBS and ensure that it is cross-referenced to the CLIN, Statement of Work (SOW), and proposed ***** <Update As Applicable, e.g., Technical Volume requests non-resource loaded Schedule>IMS**. All information found in supporting documentation shall agree. An example of a Cost Cross Reference Matrix (CRM) is shown here, and an electronic version is provided in Cost Attachment 2, Cost CRM.

***** <Insert Picture of Cost CRM Example once CA-2 is built>**

5.3.1.3 Cost Summaries

For guidance on populating DD Form 1921 and 1921-1, refer to DoDM 5000.04-M-1, Cost & Software Data Reporting (CSDR) Manual dated ***** <Update As Applicable> November 4, 2011**. The CSDR Manual may be found on the DCARC website ***** <Update As Applicable>** <http://cade.osd.mil/policy/csd-r-timeline>.

5.3.1.3.1 DD Form 1921 Cost Summary Report

Provide a DD Form 1921, Cost Summary Report, or comparable format to a minimum of Level 2 CWBS ***** <Insert As Applicable, e.g., when using MIL-STD-881C Appendix B> plus Level 3 for elements within Prime Mission Product**. An example of a modified DD Form 1921 has been provided in Cost Attachment 5. The sum of the CWBS elements shall correspond to the Offeror's total proposed cost with subtotals provided at each higher level of the CWBS. Information required in this section includes total program costs, separately identified as nonrecurring and recurring costs, for both the prime and principal sub-contractors. The Offeror’s G&A, profit/fee, and Cost of Money (COM) are also required in this section.

5.3.1.3.2 DD Form 1921-1, Functional Cost-Hour Report

Provide a DD Form 1921-1, Functional Cost-Hour Report, or comparable format to a minimum of Level 2 CWBS ***** <Insert As Applicable, e.g., when using MIL-STD-881C Appendix B> plus Level 3 for elements within Prime Mission Product** for the contract base year and each option year

individually. Provide a total of all fiscal years and a total by fiscal year to a minimum of Level 2 CWBS *** <Insert As Applicable, e.g., when using MIL-STD-881C Appendix B> plus Level 3 for elements within Prime Mission Product. A Modified Form 1921-1 should be completed for each CWBS element (the sum of the recurring and nonrecurring equals the total cost submitted) using Cost Attachment 6, Summary of Cost and Hours by CWBS (Modified Form 1921-1). This section will be used to identify functional costs (e.g., engineering, tooling, quality control, and manufacturing/support). In-house and major subcontracted efforts must be segregated within the reports. The principal subcontractors shall submit separate Cost Attachment 6, Summary of Cost and Hours by CWBS (Modified Form 1921-1) forms in accordance with these instructions.

It is intended that the Offeror be allowed to present substantiation to the cost proposal using his own Direct Labor Hour, Material and Direct Charge categories (i.e., functional categories), internal cost accounting categories, and procedures for rate application. The Offeror should provide a functional category matrix, which shows the relationship of the Offeror's functional categories (e.g., Engineering Administration, Support-to-Test, Design Engineering, Test Engineering, etc.) to the Modified Form 1921-1 provided in Cost Attachment 6.

5.3.1.4 Detailed Estimating Methodology

The Offeror shall provide a detailed cost estimating methodology section that provides the detailed rationale and documentation of hours, material and purchased items needed by the Government to assess the credibility and executability of the proposal. The Offeror shall describe the estimating technique in sufficient detail to enable the Government to replicate the Offeror's estimating technique. If parametric simulation or statistically derived models are used, statistical measures of confidence, prediction capability, and fit should be provided for independent and dependent variables, as well as the raw data and source(s) of this raw data.

5.3.1.4.1 Labor Data

Labor Data Substantiation is required, by CWBS element, for all prime and principal subcontractor costs and clearly described using Cost Attachment 7, Cost Substantiation.

This section shall provide the substantiation and estimating methodology of the labor hours presented in paragraph 5.3.1.3 - Cost Summaries. The total labor hours estimate for each CWBS element should trace to the functional categories of Cost Attachment 6, Summary of Cost and Hours by CWBS (Modified Form 1921-1) and the CWBS level at which the estimate is substantiated. The overview of data substantiation in 5.3.1.2 – Summary of the Estimating Methodology, should be traceable to this section.

For each CWBS element provide a description of the work to be performed, the total hours proposed, and the basis for the estimate and distinguish between recurring and nonrecurring efforts.

The Offeror should also provide a complete description of the labor hour estimating methodology. This also applies to company functional labor categories. If the engineering estimate was developed in person-months, the Offeror shall show conversion from person-months to person-hours. In addition, any cross checks used to verify the reasonableness of the estimate shall be provided (e.g., drafting

hours per drawing, software lines of code/day, minutes/component for board assembly; minutes/layer for board fabrication; dollars per pound for fabrication and assembly, etc.).

If standard hours are used as the basis for an estimate, provide any factors applied to the standard hours (i.e., realization factor); the method of calculation; the total proposed hours; the basis of the factors; and the process flows for each CWBS element. History from the manufacturing facility for previous contracts of similar types and quantities of systems should be provided for all factors. Hours for the functional labor categories should be shown separately according to CWBS element. A separate identification of recurring and nonrecurring labor standards should be made.

5.3.1.4.2 Software

The Offeror shall provide software size and resource information for the Government’s cost evaluation using Cost Attachment 8, Software. Directions and definitions are provided in Cost Attachment 8, Software.

5.3.1.4.3 Material Data

Material Data Substantiation is required, by CWBS element, for all prime and principal subcontractor costs and clearly described using Cost Attachment 7, Cost Substantiation.

This section shall provide the substantiation and estimating methodology of the material dollars presented in paragraph 5.3.1.3 – Cost Summaries. The total material dollar estimate for each CWBS element should trace to functional categories of Cost Attachment 6, Summary of Cost and Hours by CWBS (Modified Form 1921-1) and the CWBS level at which the estimate is substantiated. The overview of data substantiation in 5.3.1.2 – Summary of the Estimating Methodology should be traceable to this section.

5.3.1.4.3.1 Learning Curve Theory

If learning curve theory is the basis for estimating unit costs, the Offeror should provide its formulation of the theory with all formulas, terms and exponents clearly defined. The substantiation should also include a discussion of the theoretical first unit values, any prior units, improvement slopes, and rate slopes if applicable. The Offeror shall provide this data in a summary format as provided in Cost Attachment 11, Recurring Hardware Information.

5.3.1.4.3.2 Bill of Material (BOM)

Provide a total BOM, by CWBS element. The BOM shall itemize the total BOM by cost. The BOM should include principal subcontractor costs and any Interdivisional Transfers. The Offeror may group the costs associated with consumable-type material (e.g., nuts, bolts, rivets) instead of showing costs associated with each item. The BOM should trace to the functional categories of Cost Attachment 6, Summary of Cost and Hours by CWBS (Modified Form 1921-1). All principal subcontractors should also provide a BOM, which traces to the costs included in the principal subcontractor cost summaries. The material costs should exclude burdens such as profit or fee, G&A, and material handling. The BOM should include items 1 through 13, shown below, for all material items except for consumables.

- 1) CWBS Number
- 2) Part Number
- 3) Description of the Purchased Item

- 4) Vendor – Source of the Purchased Item
- 5) Basis of Cost (e.g., Written quote, Verbal quote, Estimate, Analogy, etc.)
- 6) Quantity Required for a Deliverable System
- 7) Unit Cost Quoted
- 8) Adjustments to Quote
- 9) Adjusted Unit Cost
- 10) Total Quantity Required
- 11) Total Recurring Costs (item 6 multiplied by item 9)
- 12) Total Nonrecurring Costs
- 13) Total Proposed Costs

5.3.1.4.3 Material Factors and Quote Adjustments

Provide an explanation of and substantiation for any adjustment factor(s) applied to the material costs. This includes a definition of the factor, the method of application, detailed quantitative substantiation, and the factor. Examples of these factors include, but are not limited to, escalation, learning curves, quantity adjustments, negotiation adjustments, purchase discounts, freight, scrap, rework, and yield.

5.3.1.4.4 Other Direct Charges

Provide a summary of the recurring and nonrecurring Other Direct Charges (ODCs) elements for each CWBS element using Cost Attachment 6, Summary of Cost and Hours by CWBS (Modified Form 1921-1). Data Substantiation is required, by CWBS element, for all prime and principal subcontractor costs and clearly described using Cost Attachment 7, Cost Substantiation.

5.3.1.5 Profit or Fee

For Section 1 – TMRR Cost, the XXX TMRR contract shall be *** <Update As Applicable> CPFF contract. For purposes of proposal evaluation, the profit or fee will be the proposed fixed fee (dollar amount) by the Offeror in Section B. *** <Insert As Applicable & ensure proper reference> Section B shall be included as part of Section __, Model Contract.

For Section 2 – EMD Cost, the projected XXX EMD contract is anticipated to be a CPFF contract. The fixed fee for the projected EMD contract cost is anticipated to be *** <Insert As Applicable > 12%. For purposes of evaluation, the profit or fee will be the projected fixed fee (dollar amount) by the Offeror for the projected EMD contract cost.

5.3.2 Specific Instructions for Section 3 LRIP Option Price

The following guidelines are provided to assist the Offerors in preparing clear, concise, comprehensive and traceable proposals.

5.3.2.1 Cost Summaries

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Cost/price information for Section 2 – LRIP Option CLINs shall be submitted in Then-Year Dollars (TY\$) based on the Government's fiscal year (1 October through 30 September). Provide a DD Form 1921, Cost Summary Report by fiscal year to the level of the proposed CWBS elements for the contract. An example of a modified DD Form has been provided in Cost Attachments 5 (CA-5), Modified DD1921 Form. The sum of the CWBS elements shall correspond to the Offeror's total proposed price with subtotals provided at each higher level of the CWBS. Information required in this section includes total program costs, separately identified as nonrecurring and recurring costs, for both the prime and principal subcontractors. The Offeror's G&A, profit/fee, and Cost of Money (COM) are also required in this section.

Provide a Cost Attachment 6, Summary of Cost and Hours (Modified Form 1921-1), or comparable format to a minimum of the WBS level included in Cost Attachment 6 for the proposed CWBS elements in the contract option years. The Offeror shall utilize Cost Attachment 6 to provide a total of all fiscal years and a total by fiscal year for the level of indenture included in Cost Attachment 6. This section will be used to identify functional costs (e.g., engineering, tooling, quality control, and manufacturing/support). In-house and major subcontracted efforts must be segregated within the reports. The principal subcontractors shall submit separate 1921-1 forms in accordance with these instructions.

5.3.2.2 Ground Rules and Assumptions

As this is a competitive acquisition with adequate price competition anticipated, the price documentation requested is not considered cost or pricing data and shall not be certified in accordance with FAR 15.406-2. However, in the event that adequate price competition does not exist after receipt of proposals, the Government reserves the right to request additional cost or pricing data as necessary from both the Offeror and subcontractors and may conduct negotiations with the Offeror, pursuant to FAR Part 15.403-4, in order to ensure a reasonable and realistic price/cost. Further, the Offeror may be required to provide a Certificate of Current Cost or Pricing Data prior to award, pursuant to FAR 15.406-2. Offeror shall acknowledge the requirement to provide additional cost or pricing information and certify the data prior to award if/when requested by the Government.

The Offeror shall provide sufficient information to support its price as well as an explanation of all ground rules and assumptions that affect the price. Any apparent imbalances in the pricing, high or low proposed prices as compared to historical data, or any other anomalies should be fully explained. Topics to be addressed include, but are not limited to, investments and programmatic variables (e.g., inflation/escalation, location, make/buy decisions, prime/subcontractor relationships, and business base concerns, etc.)

5.3.2.3 Price Information

***** <Insert As Applicable if using Price Realism to evaluate Fixed Price CLINs as well as Price Reasonableness>** Realism and Consistency between the Technical and Cost Volumes: Demonstrate that the unit prices and the total evaluated price are realistic and are commensurate with the work required by the solicitation and the technical approach identified in the technical volume of the proposal. Show traceability with the CWBS, CLINs, statement of work, specification, and proposed effort. Refer to specific sections in the Technical Volume as needed. The Offeror shall submit cost

information against the Contractor Work Breakdown Structure (CWBS) and ensure that it aligns to the Program Work Breakdown Structure (PWBS); and that it is cross-referenced to CLIN, Statement of Work (SOW), and proposed IMS. The Offeror shall provide a cross reference matrix using Cost Attachment 2 Cost CRM.

The Government is not soliciting any investments. However, in order to properly assess a proposed price that appears low due to a corporate decision to absorb costs, e.g., lower than usual burdens or rates, the Offeror shall fully identify and explain any such investments. Additionally, the Offeror shall propose an H-clause, which specifically states the fiscal adjustment and identifies the Offeror’s liability in *** <Insert As Applicable & ensure proper reference> Volume 6, Terms & Conditions, Assumption and Exceptions or Deviations. At the discretion of the PCO, this may be a contractually binding clause.

Identify the proposed prices for each contract line item number (CLIN) or Subcontract Line Item (SLIN) as specified in Section B of this solicitation.

5.3.3 Specific Instructions for Section 4 (Contractor Rates)

The Offeror should provide rate information used in the proposal in this section. Due to the proprietary nature of company rates, this information may be presented separately for each Offeror and principal subcontractor. A trace to paragraph 5.3.1.3 - Cost Summaries for both Section 1 TMRR and Section 2 EMD should be included to ensure proper use of the rates. If providing calendar year rates, include a trace between calendar year rates and Government Fiscal Year rates used in developing the estimate as well as a trace to the functional categories of Cost Attachment 6 Summary of Cost and Hours by CWBS (Modified Form 1921-1). If for accounting purposes, the Offeror uses a yearly base different from the calendar year base, a description is required.

The Offeror shall use and submit Forward Pricing Rate Agreements (FPRAs), Collective Bargaining Agreements (CBAs), and Area Wage Determinations (AWDs) if applicable, in pricing the Cost Volume. The Offeror shall identify whether the labor rates proposed are FPRAs, CBAs, AWDs, ACO/DCAA recommended rates, or Offeror proposed rates. The Offeror shall propose in compliance with the current hourly rate set forth in the Department of Labor Wage Determination, and shall not be escalated for adjustments under the Service Contract Act.

5.3.3.1 Direct Rates

5.3.3.1.1 Current Direct Labor Rates

The Offeror should provide the most current direct labor rate, for both the Offeror and the principal subcontractors that are in effect at the time of proposal submission. This includes the current FPRAs direct labor rates, the projected direct labor rates assuming award, the current company labor categories, and the mix of company labor categories proposed for this contract. Discuss the application of these rates in the proposal. The Offeror should document the development of composite direct rates, which represent a combination of company labor categories, functional elements, or calendar year accounts. In addition, the Offeror should submit detailed definitions for each direct labor category and include the basis for any projected annual increases and any other factors. Direct labor

categories may include, but are not limited to, engineering, maintenance/support, tooling, quality control, manufacturing, and integration.

5.3.3.1.2 Skill Mix

The Offeror should address the Offeror's and principal subcontractors' skill mix used to build up composite rates for each CWBS element (recurring and nonrecurring), support for the proposed skill mix, and a description of the methodology for the composite rate build up. Additionally, the Offeror shall provide similar information pertaining to the skill mix for historical analogous programs, explaining how the historical skill mix supports the proposed skill mix. The Offeror should provide Cost Attachment 10, Skill Mix/Composite Direct Labor Rates, showing the details behind the skill mix and buildup of composite rates for the CWBS elements. Provide a trace between the composite rates included in Cost Attachment 10 and the rates contained in Cost Attachment 6, Summary of Cost and Hours by WBS (Modified 1921-1).

The Offeror shall provide similar information pertaining to the skill mix for historical analogous programs using Cost Attachment 10. Include the basis of estimate, explaining how the skill mix from historical programs supports the skill mix proposed for CWBS tasks. The Offeror shall explain and justify all differences in skill mix between the CWBS tasks and historical efforts.

NOTE: Where the format specified in Cost Attachment 10 is not sufficient to show the buildup of the composite direct labor rate, the Offeror may expand the form, or provide the information in the format available from the Offeror's estimating and accounting system, to meet the requirement. Provide separate records for the nonrecurring and recurring estimates as necessary. This applies equally to a principal subcontractor.

5.3.3.2 Indirect Rates

The Offeror should identify the indirect rates, for both the Offeror and the principal subcontractors, used in the proposal. The Offeror should include a projection of indirect rates that assumes the award of the contracts in their business base. Any changes to a current FPRA due to the award, variation of the business base or other factors should be fully described and justified. Discuss the application of these rates in the proposal. In addition, provide summary-level definitions for each major indirect rate account, explaining what costs are included in each overhead pool. The indirect accounts may include, but are not limited to, engineering overhead, manufacturing overhead, general and administrative (G&A), material handling overhead, and Cost of Money (COM). Describe the development of composite indirect rates, which represent a combination of company labor categories, functional elements, or calendar year accounts.

5.3.3.3 Cost to Sell Equations

The Offeror should submit the methodology used to transfer the cost data (i.e., direct labor hours or material direct dollars) into a sell cost to the Government (i.e., fully burdened with fee). This includes the sequence in which indirect rates, profit, etc. were applied to direct costs to determine the sell cost. Include the base against which each of the overhead pools is applied in this description.

5.3.3.4 Escalation

The Offeror should provide all escalation-related assumptions used in the proposal. Information required in this section includes, but is not limited to, annual rates of escalation, source of the escalation indices, rationale for their applicability, and the method of their application.

5.3.4 Specific Instructions for Section 5 (Other Cost/Price Impacts)

Identify and substantiate, in the Offeror’s own format, other cost adjustments that may impact the cost for the CWBS elements not previously identified. Identify, in detail utilizing Offeror’s own format, the costs or savings that would be incurred and describe the performance that would cause these costs/savings to occur. Note: the Government is not soliciting any investments.

Provide an assessment of the potential for Cost Growth based on the estimating methodology employed and the extent to which risk mitigation efforts are integrated into the proposed cost. Support the assessment with substantiating data, identification of assumptions and detailed description that illustrates how the estimating methodology was employed. Also describe any tangible/contractually binding cost controlling features and/or features that reduce the Government’s Cost Growth risk that is proposed, if any.

5.3.5 Specific Instructions for Section 6 (GFE/GFP/GFF/GFI)

Identify any Government Furnished Equipment /Property/ Facilities/ Information (GFE/GFP/GFF/GFI) using Cost Attachment 10 required in performance of the contract *** <Insert As Applicable when GFE is provided in RFP or end sentence above> in addition to Section J Attachment __ Government Furnished Equipment /Property/ Facilities/ Information. If additional GFE/GFP/GFF/GFI is required, the Offeror shall provide the following information for each item required:

- 1) Associated CLIN.
- 2) A complete description of the required GFE/GFP/GFF/GFI including part number and serial number, if applicable.
- 3) Where the GFE/GFP/GFF/GFI is to be located.
- 4) The unit cost, quantity and total cost of the GFE/GFP/GFF/GFI.
- 5) The name, organization, complete address and telephone number of a cognizant Government point of contact.

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- 6) In the case of GFE/GFP/GFF/GFI accountable to other Government contracts, a copy of the correspondence authorizing use of such GFE/GFP/GFF/GFI on this contract.
- 7) The monetary impact to the Offeror’s proposal if the proposed GFE/GFP/GFF/GFI is not provided as GFE/GFP/GFF/GFI.
- 8) Any additional comments the Offeror believes to be pertinent to the Government’s evaluation.

If *** <Insert As Applicable > additional GFE/GFP/GFF/GFI is not required, the Offeror shall so state.

End of Development Program with Both CPFF & FFP CLINS and a Single Factor Example.

FFP Trainer CLS Program with LH and Travel/ODC Cost CLINs Example:

5.1 Volume Content

This Volume shall contain the information requested below and shall include a copy of Price Attachment *** <Update As Applicable> L-8 (Supplies Services Prices) of the solicitation with the Contract Line Item Numbers (CLINs) and Subcontract Line Item Numbers (SLINs) Unit Prices. For evaluation purposes, the Estimated Amount shall be filled in (Supplies and/or Services and Prices and/or Costs) using the Government-provided Estimated Quantities in the solicitation and calculated using the instructions below. The Offeror's labor classifications should cross-reference to the Department of Labor (DOL) Area Wage Determination classifications in *** <Update As Applicable> Section J, Attachments 106–110, 118, 123, 126 and 127. In addition, the Offeror shall provide a percentage breakdown of the Contractor indirect costs and burdens added to the Government-provided Estimated Amounts for any and all Cost Reimbursable CLINs (CRCLINs) in Price Attachment *** <Update As Applicable> L-8 (Supplies Services Prices). *** <Update As Applicable> L-8 (Supplies Services Prices) prices shall be provided separately in one digital data copy in MS Office 2010 Excel and PDF format on CD-ROM media. Within all Excel spreadsheets, the Offeror shall use formulas and functions to the maximum extent possible and avoid using output type, hard-coded, “value only” cells. If links are utilized, supply those referenced files. Spreadsheets shall not be protected.

All price and price supporting information shall be contained in Volume 5 (Price) and Price Attachments *** <Update As Applicable> L-8 (Supplies Services Prices), L-9 (Prime Contractor Cost Summary) and L-10 (Non-Prime Entity Cost Summary) of the Offeror’s proposal. No price or pricing information shall be included in any portion of the proposal, including cover letters, except for the *** <Update As Applicable> Price (Volume 5), the Contract Administration (Volume 6), and the Small Business Subcontracting Plan (as part of Annex G). Adequate substantiation is necessary for the Government to evaluate the price and scope of the Offeror’s estimate for reasonableness and completeness, and to ensure all PWS requirements are included in the price proposal. Proper presentation and adequate supporting documentation will ensure the price proposal is efficiently evaluated and all assumptions are understood. The burden of proof for cost and price credibility rests with the Offeror.

The following is a list of the Price Attachments that the Offeror shall utilize to provide price information as required for this Volume and are to be submitted within this volume and electronically. .

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If no Non-Prime Entities are utilized, do not fill out the Non-Prime Entity Cost Summary. Non-Prime Entity is defined as a JV Team Member, subcontractor, corporate parent, division, subsidiary or affiliate. *** <Update As Applicable>

Attachment #	Name of File	Title of Attachment
L-8	Vol 5 SuppSvcPr.xlsx	Supplies Services Prices
L-9	Vol 5 Prime CCS.xlsx	Prime Contractor Cost Summary
L-10	Vol 5 Non-Prime Entity CS.xlsx	Non-Prime Entity Cost Summary
L-11	Vol 5 CSDR.xlsx	Draft CSDR Plan
L-12	Vol 5 Manning Supplement.xlsx	Manning Supplement

The price volume of the proposal provided by the Offeror shall be constructed in the following format and shall contain all data/information applicable to the entire contract to include all contract options.

Section 1 – Proposed Price

1.1 Price Attachment *** <Update As Applicable> L-8 Supplies Services Prices

Section 2 – Contractor Rates

Section 3 – FFP CLINs

3.1 Ground Rules and Assumptions

3.2 Contract Price for Fixed Price Labor

Price Attachment L-9 Prime Contractor Cost Summary

Price Attachment L-10 Non-Prime Entity Cost Summary

Price Attachment L-12 Manning Supplement

3.3 Other Cost Impacts for Fixed Price Labor (as required)

Section 4 –LH CLINs/SLINs

4.1 Ground Rules and Assumptions

4.2 Contract Price for Labor Hour Rate

Price Attachment L-9 Prime Contractor Cost Summary

Price Attachment L-10 Non-Prime Entity Cost Summary

Price Attachment L-12 Manning Supplement

4.5 Other Cost Impacts for Labor Hour Rate (as required)

Section 5 –CR CLINs/SLINs

5.1 Ground Rules and Assumptions

5.2 Contract Cost for Cost Reimbursement CLINs/SLINs

5.3 Other Cost Impacts for Cost Reimbursement CLINs/SLINs (as required)

Section 6 –Cost & Software Data Reporting (CSDR)
Price Attachment L-11 Draft CSDR Plan

Section 7 –Evaluated Price

5.2 Ground Rules and Assumptions

As this is a competitive acquisition with adequate price competition anticipated, the price documentation requested is not considered certified cost or pricing data and shall not be certified in accordance with FAR 15.406-2. Should adequate price competition not exist after receipt of proposals, the PCO reserves the right to obtain certified cost or pricing data as necessary from both the Offeror and subcontractors, pursuant to FAR 15. By submitting a proposal, the Offeror grants the PCO, or an authorized representative, the right to examine records that form the basis of the pricing proposal, should adequate price competition not exist. This examination and review can take place at any time before the award.

The cost of general purpose items required to conduct normal business operations will not be considered allowable Other Direct Charges in the performance of this contract. The following types of general purpose costs required to conduct normal business operations are not directly reimbursable: the cost and associated costs for telephones and telephone charges (except for project-related telephone charges for performance of this contract which, per contractor's DCAA-approved accounting system, may be directly reimbursed under communication expenses), modems, typewriters, reproduction machines, word processing equipment, personal computers, computer software, Internet access charges, facsimile machines, commercial carrier charges, pagers, and other general purpose office equipment and office supplies. Contractor should bid IAW its approved disclosure statement on file.

The burden of proof for cost and price credibility rests with the Offeror. The Offeror shall provide an explanation of all ground rules and assumptions that affect the price estimates. Any apparent imbalances in the pricing, high or low proposed prices as compared to historical data, or any other anomalies should be fully explained. Topics to be addressed include, but are not limited to, investments, programmatic variables (e.g., inflation/escalation, location, make/buy decisions, prime/non-prime entity relationships, and business base concerns), etc.

The Government is not soliciting any investments. However, in order to properly assess a proposed price that appears low due to a corporate decision proposed by the Offeror to absorb costs, e.g. lower than usual burdens or rates, the Offeror shall propose a clause that specifically states the fiscal adjustment and identifies the Offeror's liability. At the discretion of the PCO, this clause shall be incorporated into the contract and shall be a contractually binding clause. See *** <Update As Applicable> Volume 6 (Contract Administration), paragraph f(4) for guidance.

The Offeror shall prepare and submit the cost proposal narrative substantiation and rationale in *** <Update As Applicable> MS Microsoft Word 2010 and PDF format and any numerical data in a Microsoft Excel 2010 and PDF format on CD-ROM. Files received in a format other than requested are unacceptable. Within all Excel spreadsheets, the Offeror shall use formulas and functions to the

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maximum extent possible. Output-type, hard-coded, “value only” cells are not acceptable. Numerical data presented in MS Office format must not be pictorial (i.e. pasted as a picture out of a MS Excel file). If external links are utilized, supply those referenced files. The proposal shall be unprotected and unlocked, with formulas intact to show mathematical operations. Ensure that the electronically submitted filenames are directly traceable to the hard copy submittals.

5.3 Price Proposal Instructions

5.3.1 Proposed Price

The proposal shall contain one completed Price Attachment ***** <Update As Applicable> L-8** (Supplies Services Prices). The Offeror shall complete Price Attachment **L-9** (Prime Contractor Cost Summary) and the applicable Non-Prime Entity shall complete Attachment **L-10** (Non-Prime Entity Cost Summary), the Offeror shall complete Price Attachment **L-9** (Prime Contractor Cost Summary) and the applicable Non-Prime Entity shall complete Price Attachment **L-10** (Non-Prime Entity Cost Summary) per the instructions within the attachments, including the appropriate price buildup information.. The Total Sell Price/Rate of each CLIN and SLIN in Price Attachment **L-10** (Non-Prime Entity Cost Summary) shall be an input in to the “Non-Prime Cost \$” column for the respective CLIN and SLIN in Price Attachment **L-9** (Prime Contractor Cost Summary). The Total Sell Price/Rate of each CLIN and SLIN in Price Attachment **L-9** (Prime Contractor Cost Summary) incorporates both the Offeror (Prime Contractor) Price/Rates as well as Non-Prime Entity Price/Rates (if there are Non-Prime Entities). The Total Price/Rate for the CLINs and SLINs in Price Attachment **L-9** (Prime Contractor Cost Summary) shall be the Unit Price, or Estimated Amount, in Price Attachment **L-8** (Supplies Services Prices). The Offeror’s applicable Non-Prime Entity shall complete Price Attachment **L-10** (Non-Prime Entity Cost Summary) for any subcontractors, Joint Venture team members, corporate parent, division, subsidiary or affiliate (e.g. any contractor with a different CAGE code/DUNS than the Offeror). Refer to Part A, “General Instructions”, Paragraph 1.0 “General” for the definition of the term “entity” as used in these instructions.

The Offeror (Prime Contractor) shall provide, in a separate tab included within Price Attachment ***** <Update As Applicable> L-9** (Prime Contractor Cost Summary), a Total Price for each Non-Prime Entity to be utilized by the Offeror. The Total Price for each Non-Prime Entity shall be reported at a summary level with a single dollar amount that includes all work to be performed by that particular Non-Prime Entity, excluding any Parts & Material/Incidental Material costs, for the Base Period and all Option Periods. Additionally, the Offeror shall provide the percentage of the Offeror’s Total Proposed Price that corresponds to each Non-Prime Entity’s dollar amount. The Offeror shall provide this information for all Non-Prime Entities. The only exception shall be for those Non-Prime Entities that choose to submit its rates directly to the Government for proprietary reasons. See example below.

The Non-Prime Entity Total Prices and associated Total Price percentage (as a percentage of the Offeror’s Total Proposed Price (minus Parts & Material/Incidental Material CLIN costs)) should match those reported in Volume 1 (Executive Summary), ***** <Update As Applicable> Table ES-1 “Offeror Summary”**. Any differences need to be explained and justified. The Non-Prime Entity and Offeror Total Prices must not include any Parts & Material/Incidental Material costs.

Example calculation:

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Non-Prime Entity	*Non-Prime Entity Total Price (Single dollar amount for total of ALL work performed by this entity)	*Offeror (Prime Contractor) Total Proposed Price	*Non-Prime Entity Price % (Entity percentage of Offeror’s Total Proposed Price)
Non-Prime Entity “A”	*** <Update As Applicable> \$50,000	\$2,000,000	2.5%
Non-Prime Entity “B”	\$300,000	\$2,000,000	15.0%
Non-Prime Entity “C”	\$75,000	\$2,000,000	3.75%

* Does not include any Parts & Material/Incidental Material costs

Additionally, for evaluation purposes, the Offeror shall propose and populate all Estimated Amounts in Price Attachment *** <Update As Applicable> L-8 (Supplies Services Prices) by entering the respective Offeror-proposed Unit Price of each CLIN and SLIN for the Base Period and all Option Periods. The Unit Prices will automatically multiply with the Government-provided Estimated Quantity to auto-populate the Estimated Amount column cells. The inclusion of Option Period CLINs in the evaluation will not bind the Government to exercise any of the options.

The Government will calculate the price of the FAR 52.217-8 clause, Option to Extend Services, by taking the Government’s Total Evaluated Price for the *** <Update As Applicable> 4th Option Period (CLINs 04XX) and dividing this value by “2”.

The Government will develop an evaluated price IAW the criteria specified in Section M. The Offeror shall use the “round” function in Excel and truncate all fractional dollars to two (2) decimal places (e.g., \$47.24) ensuring no dollar or numerical value included in the Unit Price or Estimated Amount columns exceeds two (2) decimal places. The Offeror shall input the CLIN and SLIN Unit Prices directly into Price Attachment *** <Update As Applicable> L-8 (Supplies Services Prices) worksheets and not import or “link” the Unit Price/Cost from any other worksheets or workbooks. Offerors may “link” cells or worksheets in other Attachment documents or Excel workbooks to show calculations or workups to substantiate Unit Prices, Estimated Amount, and Total Prices listed in Price Attachment L-8 (Supplies Services Prices).

5.4 Contractor Rates

Offeror shall provide rate information used in the proposal in this section. Due to the proprietary nature of company rates, this information may be presented separately for each Offeror and Non-Prime Entity, as applicable. If Non-Prime Entities chose not to submit rates along with the Prime contractor’s proposal, they may submit the rate information directly to the Government for evaluation.

5.4.1 Direct Rates

The Offeror shall provide the most current direct labor rates, for both the Offeror and the Non-Prime Entities that are in effect at the time of proposal submission. The Offeror shall use Forward Pricing Rate Agreements (FPRAs), Collective Bargaining Agreements (CBAs), and Area Wage Determinations (AWDs) if applicable, in pricing the Price Volume. Any FPRAs used shall be submitted with the proposal. The Offeror shall identify whether the labor rates proposed are FPRAs, CBAs, AWDs, ACO/DCAA recommended rates, or Offeror proposed rates. The Offeror shall propose in compliance with the Department of Labor CBA and AWD Wage Determinations provided in ******* **<Update As Applicable>** Section J Attachments **11, 12, 13 and 14**. The base period shall be proposed in compliance with current **FY17** hourly rates set forth in the aforementioned AWD/CBA Wage Determinations. All option periods shall likewise be proposed in compliance with the AWD and applicable **FY17** CBA rates provided in Section J Attachments **11, 12, 13 and 14**, which shall not be escalated for any contingency to cover increased costs for which an adjustment is provided under FAR 52.222-43, Fair Labor Standards Act and Service Contract Act-Price Adjustment (Multiple Year and Option Contracts).

5.4.2 Indirect Rates

The Offeror shall identify the indirect rates for the Offeror and Non-Prime Entities used in the proposal. The Offeror shall identify whether the indirect rates proposed are FPRAs, CBAs, AWDs, DCMA recommended rates, or Offeror proposed rates. If indirect rate proposals are from other than FPRAs, CBAs, AWDs, DCMA recommended rates or Offeror proposed rates then the Offeror must clearly identify the source of the indirect rates and substantiate their buildup. The Offeror must provide a schedule, which contains the proposed burden rates by year for material, direct labor overhead, General, and Administrative (G&A) expense, and any other applicable burden applied to direct cost elements and must include how the burden rates are calculated or built up.

Also, provide summary-level definitions for each major indirect rate account, explaining what costs are included in each overhead pool and must include how the burden rates are calculated or built up. The indirect accounts may include, but are not limited to, engineering overhead, manufacturing overhead, G&A, material handling overhead, product supply overhead, and Cost of Money (COM).

5.4.3 Price/Cost to Sell Equations

The Offeror shall submit the methodology used to transfer the cost data (i.e., direct labor hours) into a sell price to the Government (i.e., fully burdened with fee). This includes the sequence in which indirect rates, fee, etc. were applied to direct costs to determine the sell price. Include the base against which each of the overhead pools is applied in this description.

5.5 FFP CLINs/SLINs

5.5.1 Ground Rules and Assumptions for Firm Fixed Price CLINs

The Offeror shall provide an explanation of all ground rules and assumptions that affect the price estimates.

5.5.2 Contract Prices for Firm Fixed Price CLINs/SLINs

*** <Insert As Applicable if using Price Realism to evaluate Fixed Price CLINs as well as Price Reasonableness> Realism and Consistency between the Technical and Price Volumes. Demonstrate that the total proposed price/cost are reasonable, realistic, and commensurate with the work required by the solicitation and the technical and management approaches identified in the Technical Volume of the proposal. Show traceability with the CLINs, SubCLINs, the PWS, proposed effort and proposed manning levels and the costs/prices. Refer to specific sections in the Technical Volume as needed to illustrate the consistency between the Price Volume and the Technical Volume. The Offeror shall explain any inconsistency between promised performance and cost/price, as well as any appearance of unbalanced pricing, in the proposal. The Offeror's labor classifications should cross-reference to the DOL Area Wage Determination classifications provided in *** <Update As Applicable> Section J, Attachments XXX.

The Offeror shall provide and identify the proposed price by CLIN/SLIN using Price Attachment *** <Update As Applicable> L-8 (Supplies Services Prices). In addition, the Offeror shall identify and submit the proposed prices by CLIN/SLIN and Work Center Code and Naval Aviation Maintenance Program (NAMP) Work Center Code (if applicable) using Price Attachment *** <Update As Applicable> L-9 (Prime Contractor Cost Summary) and Price Attachment *** <Update As Applicable> L-10 (Non-Prime Entity Cost Summary), if applicable. The Offeror shall provide a duplicate of the manning (specified in Section L, *** <Update As Applicable> Volume 2 (Technical), Annex D) with associated pricing data added for the Base Periods and each Option Periods. Additionally, a Manning Supplement (Price Attachment *** <Update As Applicable> L-12) shall be provided to correlate the proposed manning in Annex A (Manning) to the proposed pricing per labor category for each CLIN/SLIN in Price Attachment L-9 (Prime Contractor Cost Summary) and Price Attachment L-10 (Non-Prime Entity Cost Summary). *** <Delete if price build up for all CLIN/CLIN is desired> If the manning, price buildup, Unit Price and Estimated Amount are the same for multiple identical Option SLINs within a CLIN, the proposal may show a single build-up and then state “SLINs XXXX-XXXX build-up is the same as SLIN XXXX.” Any inconsistency between proposed performance and price or any appearance of unbalanced pricing should be explained in the proposal.

5.5.3 Other Cost Impacts for Firm Fixed Price Labor

Identify and substantiate, in the Offeror's own format, other cost adjustments that may impact the proposed cost not previously identified.

5.6 LH CLINs/SLINs

5.6.1 Ground Rules and Assumptions for Labor Hour CLINs/SLINs

The Offeror shall provide an explanation of all ground rules and assumptions that affect the price estimates.

5.6.2 Contract Price for Labor Hour CLINs/SLINs

The Offeror shall demonstrate realism and consistency between *** <Update As Applicable> Volume 2 (Technical) and Volume 5 (Price). Show traceability between the CLINs, the PWS, Offeror's proposed effort, , proposed manning levels and proposed prices. Demonstrate that the Unit Prices and

extended prices are realistic and are commensurate with the work required by the solicitation and the management and maintenance approaches identified in **Volume 2 (Technical)**, of the proposal. The Offeror’s labor classifications should cross-reference to the DOL Area Wage Determination classifications provided in Section J, **Attachments XXX**.

The Offeror shall provide the proposed price for each CLIN/SLIN using Price Attachment ***** <Update As Applicable> L-8** (Supplies Services Prices). The Offeror shall identify the proposed prices by CLIN/SLIN, Work Center Code, and Naval Aviation Maintenance Program (NAMP) Work Center code (if applicable) using Price Attachment **L-9** (Prime Contractor Cost Summary) and Price Attachment **L-10** (Non-Prime Entity Cost Summary), if applicable. ***** <Delete if price build up for all CLIN/CLIN is desired>**If the manning, price buildup, Unit Price and Estimated Amount are the same for multiple identical Option SLINs within a CLIN, the proposal may show a single build-up and then state “SLINs XXXX-XXXX build-up is the same as SLIN XXXX.” Any inconsistency between proposed performance and price should be explained in the proposal as well as any appearance of unbalanced pricing.

5.6.3 Other Cost Impacts for Labor Hour CLINs/SLINs

Identify and substantiate, in the Offeror’s own format, other cost adjustments that may impact the proposed cost not previously identified.

5.7 Cost Reimbursable (CR) CLINs/SLINs

5.7.1 Ground Rules and Assumptions for Cost Reimbursable CLINs/SLINs

The Offeror shall provide an explanation of all ground rules and assumptions that affect the price estimates.

5.7.2 Contract Cost for Cost Reimbursable CLINs/SLINs

In Price Attachment ***** <Update As Applicable> L-8** (Supplies Services Prices), the proposed cost of CLINs XXX (Base period only), XXX (Base period only), XXX (Base period only), XXX, and XXX shall be the Government Estimated Amount plus any Offeror mark-ups or burdens applied. The Offeror shall not add any additional direct costs to the Government Estimated Amount provided in Price Attachment **L-8** (Supplies Services Prices). For CLINs XXX (Base period only), XXX (Base period only), XXX (Base period only), XXX, and XXX the Offeror shall provide a separate tab within the Price Attachment **L-8** (Supplies Services Prices) Excel workbook that clearly shows the total mark-up or burden rate, and the individual cost elements that make up the total mark-up or burden rate. Fee or profit are not allowable on Cost Reimbursable CLINs and shall not be included as part of the mark-up or burden rate.

For Travel/Emergent Training Requirement CLINs XXX (Base period only), XXX and XXX the Government will reimburse the Contractor for travel and per diem costs on the basis of maximum allowable actual costs incurred up to the daily equivalent allowed for a Government employee IAW the Department of Defense (DOD) Civilian Personnel Joint Travel Regulations and the Federal Travel Regulations, prescribed by the General Services Administration, and the Standardized Regulations (Government Civilians, Foreign Areas), as prescribed by the Department of State. The Contractor may

include its allowable, allocable, and reasonable charges in accordance with FAR 52.216-7, “Allowable Cost and Payment,” for burden on Cost Reimbursable travel and per diem costs. Fee or profit is unallowable on the actual cost of reimbursable travel and per diem.

Offerors are to complete CR CLIN tables, included in Price Attachment ***** <Update As Applicable> L-8 (Supplies Services Prices)** tab “CR CLIN Tables”, for CLINs/SLINs XXX (Base period only), XXX through XXX (Base period only), XXS through XXX (Base period only), XXX, XXX through XXX, XXX, XXX and XXX through XXX for the Base Period and Option Periods 1-4 per the examples in paragraph 5.d below. In the CR CLIN tables included in Price Attachment L-8 (Supplies Services Prices) tab “CR CLIN Tables”, the Offeror shall add its indirect costs and applicable burdens/markups to the Government Estimated Amount to determine the total Offeror-proposed Estimated Amount to be provided on the Estimated Amount line for its respective CR CLIN in Price Attachment **L-8 (Supplies Service Prices)**.

5.7.3 Other Cost Impacts for Cost Reimbursable CLINs/SLINs

Identify and substantiate, in the Offeror’s own format, other cost adjustments that may impact the proposed cost not previously identified.

5.8 Cost and Software Data Reporting

The Offeror shall systematically collect and report actual contract costs. Contractor reports shall be prepared in accordance with the instructions contained in the most recently approved versions of DI-FNCL-81565, and DI-FNCL-81992. This solicitation includes the Government-approved cost and software data reporting (CSDR) plan for the contract (DD Form 2794) and the related Resource Distribution Table in ***** <Update As Applicable> Price Attachment L-9 (CSDR Plan)**. In this Section, the Offeror shall:

- 1) Describe the process to be used to satisfy the requirements of the DoD 5000.04-M-1, CSDR Manual, and the Government-approved CSDR plan for the proposed contract.
- 2) Demonstrate how contractor cost and data reporting (CCDR) will be based, to the maximum extent possible, upon actual cost transactions and not cost allocations.
- 3) Demonstrate how the data from its accounting system will be mapped into the standard reporting categories required in the CCDR data item descriptions.
- 4) Describe how recurring and nonrecurring costs will be segregated.
- 5) Accept or propose changes to the approved CSDR plan and related Resource Distribution Table in **Price Attachment L-9**.
 - a. The Government-approved CSDR plan includes level 3 of the contract WBS and any lower level WBS elements designated by the Government as being high risk, high value, or high technical interest.
 - b. The Offeror may proposed to further extend the WBS for its own reporting or management purposes.
 - c. If proposed changes are accepted, a revised Government-approved CSDR plan will be incorporated into the contract.

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- 6) Submit the Cost Data Summary Report (DD Form 1921) and Sustainment Functional Cost-Hour Report (DD Form 1921-5) with its pricing proposal.
- 7) The Offeror shall identify any subcontractor at any tier with a subcontract that exceeds \$50 million, by providing comments on the Resource Distribution Table, the subcontractors, or, if the subcontractors have not been selected, the subcontracted effort in this category and provide to the Government.

A post award conference will be held after contract award to include a discussion of the contractor's standard cost and software data reporting (CSDR) process that satisfies the guidelines contained in the DoD 5000.04-M-1, CSDR Manual, and the requirements in the Government-approved CSDR plan for the contract, DD Form 2794, and related Resource Distribution Table.

5.9 Evaluated Price

The Government will develop an evaluated price per the criteria in Section M. For evaluation purposes, the Offeror shall submit an ***** <Update As Applicable>** MS Excel **2010** and PDF file titled **“Eval Supplies Services Prices”** which contains a complete Price Attachment **L-8** (Supplies Services Prices), as it will be evaluated by the Government, in accordance with the definitions in this section. Price Attachment **L-8** shall be completed by populating all CLIN and SLIN Unit Price column cells with respective Unit Prices. The Government will calculate and add the FAR 52.217-8 clause (Option to Extended Services) price, as well as add to the base and each option period any additional cost to the Government (e.g., additional Government-Furnished Equipment/Government-Furnished Information required by the Offeror to implement its approach) to the Offeror's total proposed price to produce the Total Evaluated Price.

The evaluation will not bind the Government to purchase any of the options.

5.9.1 Use of Other Cost Summary

Identify costs, if any, that would be incurred in performance of this effort that have not been identified in the solicitation. Identify in detail the costs that would be incurred and describe in detail the performance that would cause these costs. Identify potential cost additions or reductions that should be considered due to the Offeror's approach or offered features.

5.10 Use of Government Property

Identify any Government Furnished Equipment /Property/ Facilities/ Information (GFE/GFP/GFF/GFI) required in performance of the contract ***** <Insert As Applicable when GFE is provided in RFP or end sentence above>** in addition to Section J Attachment **__** Government Furnished Equipment /Property/ Facilities/ Information. **If additional GFE/GFP/GFF/GFI is required,** the Offeror shall provide the following information for each item required:

- 1) Associated CLIN.
- 2) A complete description of the required GFE/GFP/GFF/GFI including part number and serial number, if applicable.
- 3) Where the GFE/GFP/GFF/GFI is to be located.

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- 4) The unit cost, quantity and total cost of the GFE/GFP/GFF/GFI.
- 5) The name, organization, complete address and telephone number of a cognizant Government point of contact.
- 6) In the case of GFE/GFP/GFF/GFI accountable to other Government contracts, a copy of the correspondence authorizing use of such GFE/GFP/GFF/GFI on this contract.
- 7) The monetary impact to the Offeror's proposal if the proposed GFE/GFP/GFF/GFI is not provided as GFE/GFP/GFF/GFI.
- 8) Any additional comments the Offeror believes to be pertinent to the Government's evaluation.

If ***** <Insert As Applicable >** additional GFE/GFP/GFF/GFI is not required, the Offeror shall so state.

End of Example 5- FFP Trainer CLS Program with LH and Travel/ODC Cost CLINs:

NOTE TO DRAFTER: The PCO may tailor the information submittal requirements Volume 6 - Contract Administration>

6. VOLUME 6 – CONTRACT ADMINISTRATION

The Offeror shall provide the following contract administration information.

- a. Offeror Representatives and Information: The Offeror shall provide a summary sheet comprised of the information listed below for the entities identified in Table ES-1 (Offeror Summary).

(1) PRIME CONTRACTOR

- i. Business Name;
- ii. Address;
- iii. Principal point of contact for this solicitation (Name, title, phone number, email);
- iv. Secondary point of contact for this solicitation (Name, title, phone number, email);
- v. Individuals authorized to negotiate with the Government and contractually bind the Offeror (Name, title, phone number, email);
- vi. Establishment Taxpayer Identification Number (TIN);
- vii. TIN of Parent Corporation (if applicable);
- viii. DUNS;
- ix. CAGE code;
- x. Business size for this effort (large or small); and
- xi. Percentage of work and role and responsibility performing.

(2) ALL OTHER ENTITIES

- i. Business Name; Address; DCMA point of contact and telephone number, if applicable;
- ii. DCAA point of contact and telephone number, if applicable;
- iii. DUNS;
- iv. CAGE code; and
- v. Percentage of work and role and responsibility performing.

- b. Government Agency Information: Provide the mailing address, telephone, fax numbers, email address, and facility codes for the Offeror’s local Defense Contract Management Agency (DCMA), Defense Contract Audit Agency (DCAA), and Government Paying Office. In addition, provide the name, telephone number, fax number, and email address for the Administrative Contracting Officer (ACO) at DCMA.
- c. Business System Compliances: The Offeror shall indicate the most recent date that the Offeror’s cognizant DCMA/DCAA determined the adequacy of the Offeror’s systems (including but not limited to Accounting, Property, and Purchasing). If the Offeror’s systems’ status is not adequate, list the date of the last adequacy determination and the current status of any systems reviews or ongoing audits;

Business Systems Status Table: The Offeror shall complete Table CA-1 (Business Systems Status) showing the current status and or determinations regarding its business systems. If any item is not applicable to the Offeror or for contract performance, so state and justify. If any item

has been determined to be unapproved/inadequate outline the potential impact on contract execution, mitigation plan, and correction plan. Submit relevant DCAA/DCMA reports, audits, and determinations in Annex X (DCAA/DCMA Reports, Audits, and Determinations).

Table CA-1 Business Systems Status

Business System	(D)FAR Reference	Status	Comments
Accounting System (1)	16.301-3		
Estimating System	215.407-5		
CAS Disclosure Statements (2)	30.202-6(b)		
Purchasing System	44.3		
Earned Value Management System	242.302(S-71)		
Property Management System	45.105		

1. Because the awarded contract will contain cost reimbursement CLINS, in accordance with FAR 16.301-3 an adequate Accounting System is a condition for award regardless of any best value determination.

2. An adequate CAS Disclosure Statement is a condition for award for Offerors subject to full CAS requirements regardless of any best value determination.

This information is to facilitate the PCO’s responsibility determination and any need to discuss information related to this does not constitute discussions.

d. Small Business (SB) Subcontracting Plan - Large Business Offerors shall provide their Small Business Subcontracting Plan conforming to the requirements of FAR 19.7 and DFARS 219.7 as part of Annex X ((Small Business Subcontracting Plan) and Table T-X (Small Business Goals)). The SB Subcontracting Plan of the successful Offeror(s) will be reviewed as well as approved by the PCO prior to contract award as part of the responsibility determination. See FAR 19.702(a) (1) Statutory requirements, regarding failure of the apparent successful Offeror to negotiate and submit a SB Subcontracting Plan or submit a Comprehensive or Commercial SB Subcontracting Plan acceptable to the Contracting Officer. The successful Offeror’s approved Subcontracting Plan will be incorporated into the resultant contract and contractor performance against the plan will be monitored by the Government during contract execution.

e. Terms and Conditions:

All exceptions and deviations that the Offeror takes from the provisions of the solicitation and its applicable documents shall be included in this section.

An exception occurs if/when an Offeror states it will not comply with a solicitation requirement, usually involving contract terms and conditions. A deviation is where an Offeror states it will not comply with a solicitation requirement but proposes an alternative to meet the intent of the requirement, usually involving a PBSOW requirement. An exception or deviation is considered a deficiency.

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The Offeror shall provide one of the following two statements in this section. If the Offeror takes any exceptions or deviations to the provisions of the solicitation and its applicable documents, the Offeror shall provide the following statement: “All exceptions and deviations taken from the solicitation terms, conditions or requirements, including any applicable documents, are included in this section”. If the Offeror does not take any such exceptions or deviations, then the Offeror shall provide the following statement: “No exceptions or deviations are taken to the terms and conditions or any requirement of the solicitation.”

If proposing an exception or deviation, the Offeror shall provide a detailed description for each in this section. Indicate the difficulty with the applicable requirement and the proposed solution. Specifically identify the portion of the solicitation and the proposal, which are affected. Also, identify any proposed H-clauses containing unique contract terms and conditions not covered by clauses in this solicitation and associated with an exception or deviation identified in this section. The Government will review the information and may elect to clarify the requirement via an amendment or clarify the requirement by holding discussions.

- f. Model Contract Documents: Documents such as Specification(s), PWS, SOW, etc. that are provided for evaluation of the Technical Factor should be referred to here and provided only once. The final document from the Technical Volume will be used when a model contract needs to be established vice creating a new document. The model contract documents should be provided as a separate electronic file and as a separate section in this volume. The Offeror shall provide the following documents within this section:
- (1) Original signed SF33 (Solicitation, Offer, and Award) cover page of the solicitation and a signed SF30 cover page of each amendment (as applicable) with all applicable Blocks completed and acknowledgement of receipt of each amendment (as applicable) to this solicitation. The SF-33 Block 12 “fill-in” (proposal validity date) shall be completed IAW Section A (Solicitation/Contract Form);
 - (2) Signed Representations, Certifications, and Acknowledgements or Online Representations and Certifications Application (ORCA) reference;
 - (3) Section B with proposed pricing;
 - (4) Section F with delivery dates filled in;
 - (5) A complete copy of all FAR, DFARS, NAVAIR, and special clauses and provisions requiring contractor fill-ins and
 - (6) Section H (including any other proposed clauses. All Offeror proposed H Clauses, or other contract additions, in full text, if applicable. If an Offeror proposes to perform work above or not included in this solicitation (e.g., including, but not limited to, an aspect of a proposal that the Offeror believes the Government should evaluate as a strength), the Offeror must include contractually binding additions for the contract award document. These additions may be H clauses, additions to the PBSOW, additions to the CDRLs (if data is to be delivered), or other additions. For the H clause, it must state as a minimum: a) the Offeror’s performance responsibilities; b) the performance periods, including delivery dates, if applicable; and, c) the financial responsibilities and liabilities of the Offeror. The Offeror’s proposal should include information regarding any Government performance and financial responsibilities incurred as a result of any proposed H clause or other proposed additions for the contract award document.

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- (7) A complete copy of the Small Business Subcontracting Plan provided in Annex X ((Small Business Subcontracting Plan) and Table T-X (Small Business Goals)), or a reference to the Small Business Subcontracting Plan provided in Annex X, that will be attached to the contract upon award

7. **VOLUME 7 – STREAMLINING VOLUME BOOK A AND BOOK B**

a. Introduction

Each Offeror must submit a proposal that is responsive to and meets the basic requirements of this solicitation. However, Offerors may also propose streamlined approaches in Volume 7 (Streamlining). Streamlined approaches are not limited to the provisions or suggested approaches of the acquisition data furnished, but may deviate to the extent that such deviation improves the overall performance of ABC program or enhances the program in any way. Offerors are encouraged to submit new ideas and approaches that they feel will improve the program and be in the best interest of the Government. <NOTE TO DRAFTER: The following language may be more specific to encourage streamlining only in a specific area.> Streamlined approaches shall not be submitted as a complete "stand alone" proposal, but should be submitted as part of a separate volume to the basic proposal, as described below. A streamlined approach may be offered if the trade-offs/innovations are self-contained such that they replace or add to a certain aspect of the Offeror's baseline approach. The streamlined approach shall identify any deviations from the Government stated requirements and the changes from the Offeror's basic proposal. However, a streamlined approach may not be used to address or correct aspects of the baseline proposal that do not meet the solicitation requirements or for which a reasonable cost/price cannot be offered.

a. Application

Streamlined approaches will be incorporated into this program in the following fashion. All Offeror's "baseline" proposals (i.e., proposals excluding streamlined approaches) will be reviewed to establish whether they are responsive to the Government's solicitation. The Government will then review each streamlined approach. The Offeror must support each streamlined approach with a risk assessment and a cost/benefit trade-off analysis that clearly shows why each streamlined approach is cost effective or enhances the item's performance. Those changed line item costs/prices will be considered to be firm proposals, not estimates.

The Government, at its sole discretion, will accept or reject those streamlined approaches (if any) it considers desirable. The resulting proposal will then be evaluated in accordance with the criteria specified in Section M of the Solicitation. The Government may then award the contract based on evaluation of the Offeror's "baseline" proposal as modified by the accepted streamlined approach (if any) without requesting final proposal revisions.

If a streamlined approach is considered more advantageous to the Government but involves a substantive or material departure from the stated basic proposal requirements or the stated evaluation criteria, all Offerors shall be given an opportunity to submit new or amended proposals on the basis of the revised requirement, provided this can be done without revealing to the other Offerors innovative solutions or techniques or other information entitled to protection from disclosure. If this cannot be done, the streamlined approach will not be accepted unless it warrants sole source preference pursuant to the criteria applicable to unsolicited proposals.

b. Proposal Information

All streamlined approaches shall be submitted in Volume 7 (Streamlining). The Offeror must provide a complete description of each streamlined approach and provide the information as would be expected if it was proposed in the baseline proposal. This volume must be submitted in two separately bound books. Volume 7 (Streamlining), Book A must contain all information, with the exception of cost/price values in dollars. Streamlining, Book B must be a duplicate of Volume 7 (Streamlining), Book A but, for each streamlined approach, it must also contain the cost/price values in dollars showing the savings to the Government (if any) resulting from its utilizing the streamlined approach. The intent is that a clear one-to-one correspondence be established between all proposed streamlined approach justifications and cost/price. This correspondence will allow for a rapid, accurate evaluation by the Government's evaluation team. Accordingly, all streamlining approach costs/prices or savings must correspond to the level of data submitted in the Volume 5 (Cost/Price) and be substantiated in a similar manner.

The Offeror must provide full justification, including a risk assessment and impact for each streamlined approach. Further, the Offeror must submit cost/price vs. benefit/trade-off analyses (including schedule), which clearly show why the Offeror's proposed approach to meeting the Government's requirements is more cost effective. Streamlined approach benefits may take the form of significantly reduced cost/price at acceptable or equal performance, comparable cost/price at significantly increased performance, or various other combinations. When cost/price is discussed in Volume 7 (Streamlining), Book A, no reference is to be made to total contract cost/price and any other acquisition cost/price. Only cost/price differences, expressed in percent (%), shall be addressed in the trade-off analyses. The corresponding cost/price values in dollars shall be shown only in Volume 7 (Streamlining), Book B. All incremental costs/prices displayed in Volume 7 (Streamlining), Book B must be applied to the appropriate CLIN, and if applicable, CWBS, so that a total cost/price element can be determined for each streamlined approach. Offerors are cautioned that all changes must have some demonstrable benefit.