SECTION L
ATTACHMENT L-1: PAST PERFORMANCE INFORMATION (PPI) for OFFERORS

Offerors must use the PPI Tool in order to electronically submit the PPI portion of the Past Performance Volume in accordance with the RFP.

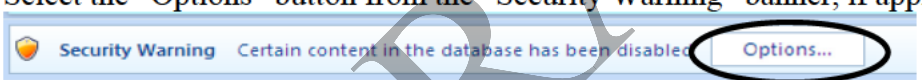
Downloading the PPI Tool (Microsoft Access database)
The PPI Tool can be downloaded by performing the following steps (if you are unable to download the Tool, contact the Procuring Contracting Officer (PCO) for assistance):

1. Access the SAM (https://www.sam.gov/) website.
2. Find the solicitation posting.
3. Locate the "ppi tool" in the attachments section of the solicitation.
4. Select the link and save the "ppi tool" to your computer. Name the file as the prime contractor + RFP number + file extension (e.g. XYZCompanyFA861710R6158.accdb).

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

Entering information in the PPI Tool
After selecting and saving the tool, enter information by performing the following steps:

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



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3. The "Security Alert" pop-up screen displays.

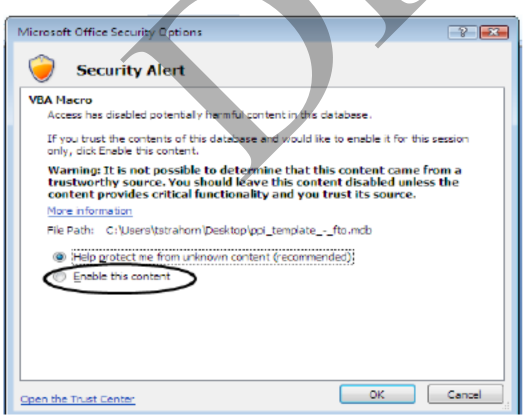


Figure 1: Security Alert Pop-up

Note:

- Files saved using Microsoft Office 2010 will have the "Enable Content" button on the "Security Warning" banner and, therefore, will not get a Security Alert pop-up.

- If a "read only" file is opened, in order to populate data in the file, click "Save As" in the "Read-Only" message bar. Enter the filename as the prime contractor + RFP number + file extension (e.g. XYZCompanyFA861710R6158.accdb).

4. Select the radio button “Enable this content” and then click “OK.” A setup pop-up screen displays.

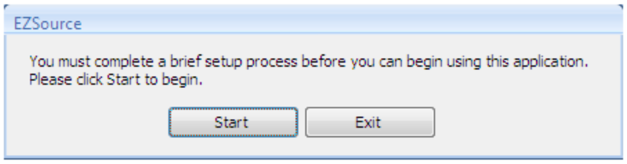


Figure 2: Setup Pop-Up

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

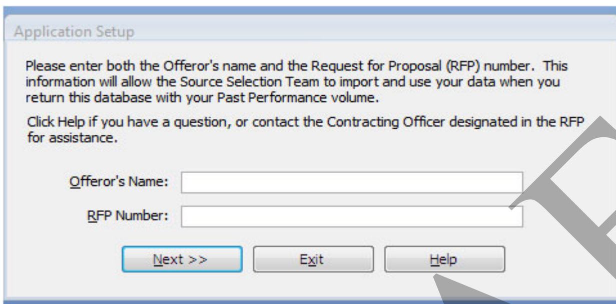


Figure 3: Application Setup Screen

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

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

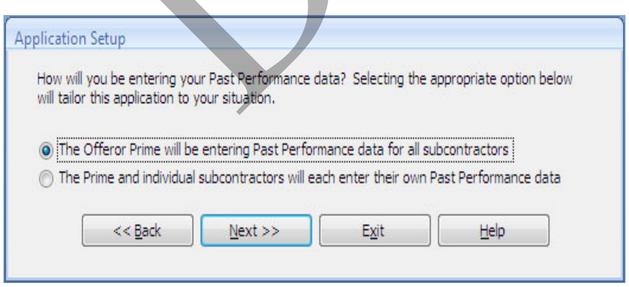


Figure 4: Continue the Application Setup

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

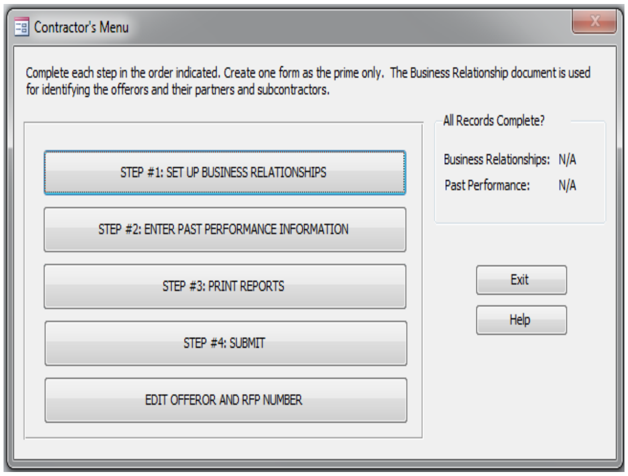
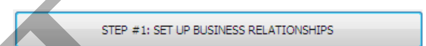


Figure 5: Contractor's Menu

8. Click the "Step 1: Set up Business Relationships" button 

to create a business relationship, if applicable, for each business entity before proceeding throughout the PPI Tool (refer to Section L of the RFP for detailed instructions). Identify all prime and sub-prime organizations and categorize them according to the appropriate role in the proposed acquisition. The "Business Relationships" screen displays.

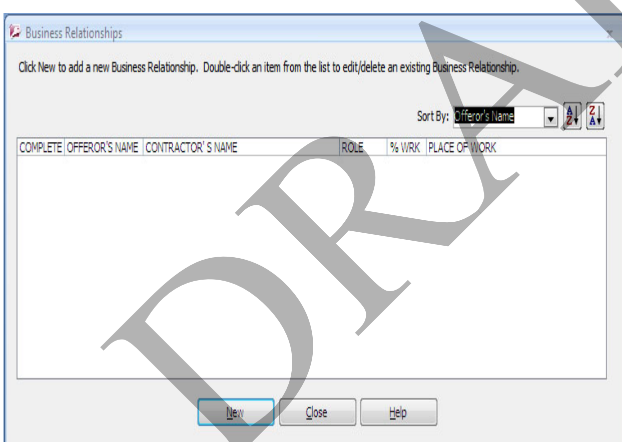


Figure 6: Business Relationships

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

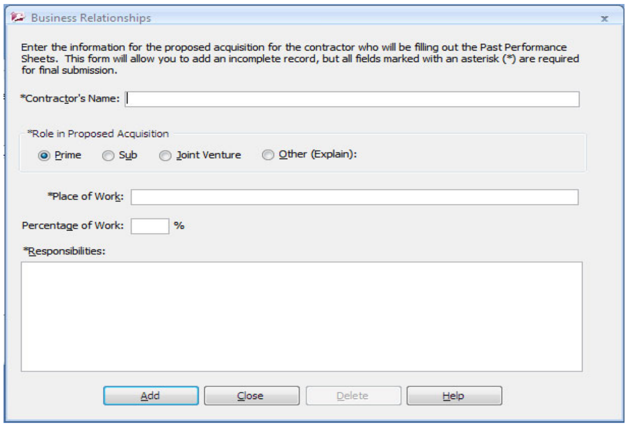
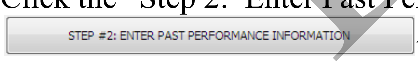


Figure 7: Enter New Business Relationship

10. Complete the fields as follows (fields marked on the screen with an asterisk '*' are required):
    - Contractor's Name: Self-explanatory
    - Role in Proposed Acquisition: Choose one of the four options – Prime, Sub, Joint Venture, or Other (Explain). An explanation comment box will display when you select "Other."
    - Place of Work: Location where contractor will perform work.
    - Percentage of Work: Identify percentage of work contributed by specified business entity
    - Responsibilities: Detail proposed responsibilities of specified business entity.
11. Select one of the buttons at the bottom of the screen.
    - Add – Saves the current business relationship and allows for the addition of a new one.
    - Close – Cancels the current business relationship without saving.

    Note: In order to edit or delete an existing business relationship in the list, double-click on it.
12. Select the "Close" button on the "Business Relationships" screen after all of the business relationships has been added.
13. Click the "Step 2: Enter Past Performance Information (PPI)" button 

to enter the Past Performance Information. The "Past Performance" screen displays.

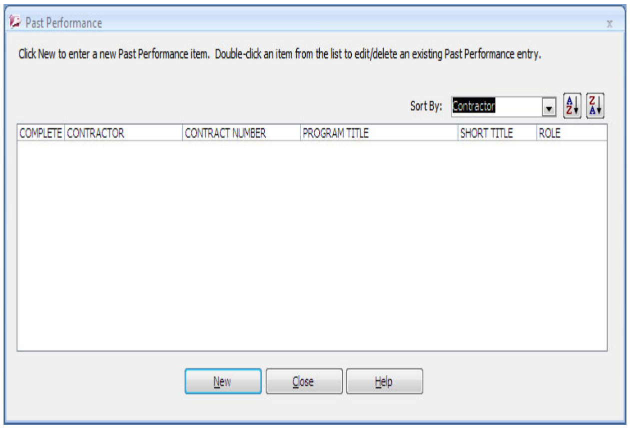


Figure 8: Past Performance

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

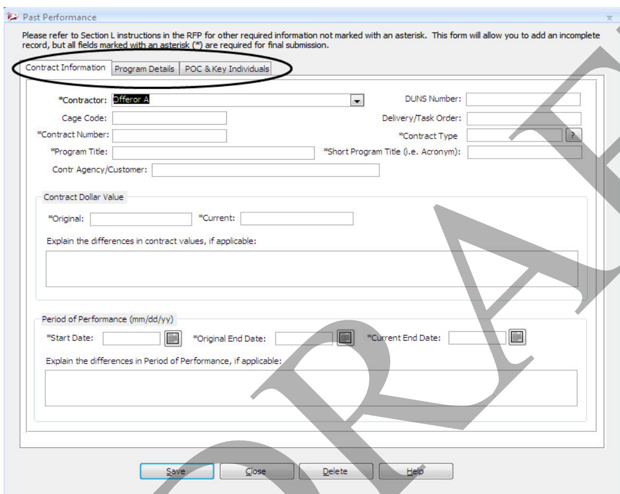


Figure 9: Enter Past Performance Information

15. Complete the fields on each of the tabs as follows (fields on the screen marked with an asterisk '*' are required):
    - Contract Information Tab
        - ❖ Contractor: Select from the dropdown the appropriate business entity.
        - ❖ CAGE Code: Self-explanatory.
        - ❖ Contract Number: If you don't have a contract number, enter "N/A."
        - ❖ Program Title: Enter full name of program.
        - ❖ Contr Agency/Customer: Enter servicing contracting agency and customer (office symbols suffice).
        - ❖ DUNS Number: Self-explanatory
        - ❖ Delivery/Task Order: If the order is provided as a stand-alone reference, enter the task/call/delivery/purchase order number.

- Contract Type: Enter Firm-Fixed-Price (FFP), Cost Plus Fixed-Fee (CPFF), Indefinite Delivery/Indefinite Quantity (ID/IQ), LH, Blanket Purchase Agreement (BPA), Cost Plus Incentive-Fee (CPIF), Cost Plus Award Fee (CPAF), etc. For additional clarification, click the question mark button.
- Short Program Title (i.e., Acronym): Enter abbreviated title for the program or enter "N/A."
- Contract Dollar Value:
  - Original: Input total contract dollar value, with all options if applicable, in the amount originally awarded on the referenced contract.
    - If ID/IQ or BPA, provide total ceiling.
    - If stand-alone task/call/delivery/purchase, provide amount of the individual contract.
  - Current: Input total contract dollar value, with all options if applicable, as the contract stands at time of PPI submission.
    - If ID/IQ or BPA, provide total ceiling.
    - If stand-alone task/call/delivery/purchase, provide amount of the individual contract.
  - Explain the differences in Contract Value, if applicable: Enter an explanation of the difference between the original contract dollar value and the revised value as of the time of PPI submission.
- Period of Performance (mm/dd/yy)
  - Start Date: Input start date of contract.
  - Original End Date: Input original end date based on award.
  - Current End Date: Input end date, as the contract stands at time of PPI submission.
  - Explain the differences in Period of Performance, if applicable: Enter an explanation of the difference between "Original End Date" and "Current End Date."

- Program Details Tab
  - Brief Description of Effort as:
    - Select Prime, Sub, Joint Venture, or Other (Explain). An explanation comment box will display when you select "Other."
    - Provide a brief description of the service provided and actual work performed under this contract reference.
    - ****If applicable: Provide information on performance problems encountered on the identified contracts. At a minimum, briefly describe the problem experienced, actions taken to alleviate the problem, and whether or not the problem was satisfactorily overcome.****
  - Explain how your performance on this contract is relevant for each applicable factor or subfactor, as instructed under Past Performance in Section M of the RFP. Include any unique aspects that demonstrate relevancy in this effort. Provide evidence to support such relevance to the requirements as described in the RFP.

- ❖ Include relevant information concerning your compliance with FAR 52.219-8, Utilization of Small Business Concerns, on the contract you are submitting, if applicable.
- ❖ Identify whether a subcontracting plan was required for the contract you are submitting. If one was required, identify in percentage terms the planned versus achieved goals during contract performance. Explain why goals were not met, if applicable.

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

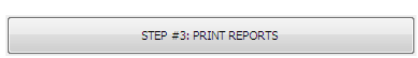
16. Select from the buttons at the bottom of the Past Performance screen:
    - Save – Saves the Past Performance Information and displays the "Contract Information" tab on the Past Performance screen.
    - Close – Closes the Past Performance screen. If there were any updates, a pop-up window displays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

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

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

Printing Reports and Submitting PPI Tool

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

1. Click the "Step 3: Print Report" button 

. A pop-up displays asking which report to print.

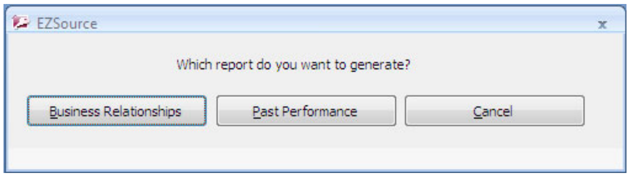


Figure 10: Select Report to Print

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

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

3. Click the “Step 4: Submit” button 

. The “Submission Instructions” screen displays.

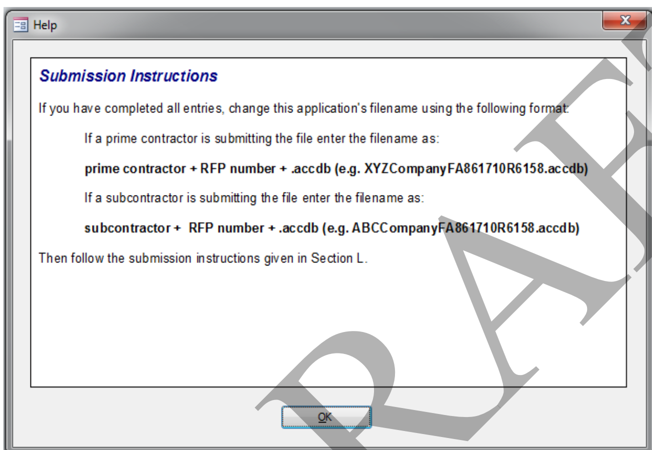


Figure 11: Submission Instructions

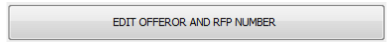
4. Follow the submission instructions. Copies of the pages generated from this tool shall be used as Tab 1 of the past performance volume.

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

     If a subcontractor is submitting the file enter the filename as:
     - subcontractor + RFP number + file extension (e.g., ABCCompanyFA861710R6158.accdb)
   - Once the file is saved to a CD or any location that is marked as “Read-only,” it must first be saved to the desktop in order to read/edit the file.

Editing Offeror and RFP Number

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

1. Click the "Edit Offeror and RFP Number" button 

. The "Application Setup" screen displays.

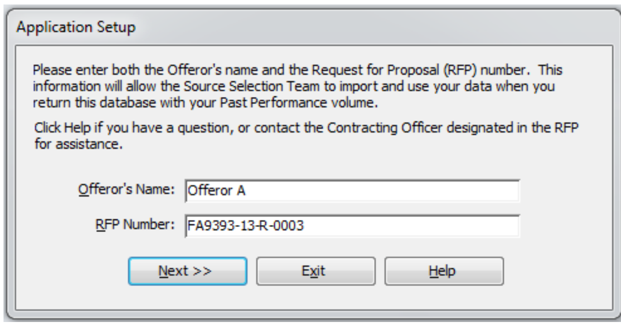
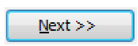


Figure 12: Change Name and RFP Number - Application Setup

2. Update the offeror's name and/or RFP number.
3. Click the "Next" button 

twice to return to the "Contractor's Menu".