Step 1 Submission

Reference Information Sheet – Contract Summary Data
(Duplicate this form as needed for each contract reference cited)

Part 1. General Contract Information – Prior Experience (Case Report#_____)

1. Contract Number & Project or Contract Name:
   _____
2. Set Aside Type (8a, SDVOSB, etc. or none as applicable):_____
3. Type of Award (check one):
   a. ____Stand alone
   b. ____IDV contract (IDIQ, BPA, etc.)
4. Type of Competition (check one):
   a. ____Sole Source
   b. ____8a Direct Award
   c. ____Competitive or Fair Opportunity / Solicitation Number:_____
5. Complete Name and Address of Contract Reference (agency, firm, or organization):
   _____
   _____
   _____
   _____
6. Date of Contract Award: _____
7. Date Work Began Under Contract: _____
8. Check one:
   a. ____Ongoing
   b. ____Complete / Completion Date:_____
9. Customer Technical POC – Name:_____
10. Customer Technical POC Contact: Phone:_____Email:_____
11. Customer Contracting POC – Name:_____
12. Customer Contracting POC Contact: Phone:_____Email:_____
13. Current Status of Contract:_____
14. Initial Contract Ceiling:_____
15. Final or Current Contract Ceiling:_____
16. Final Invoiced Amount or Amount Invoiced to Date:_____

Part 2. Contract Scope, Size, and Relevancy Information

17. Required Attachments

a. Attach the signed contract face page (1 page, unless signatures appear elsewhere).
b. Attach the contract's SOW/PWS requirements section that relates to our RFP.
•No page limit, but exclude unnecessary material (e.g., agency policies, reporting procedures, telework rules, building access instructions).
• Provide only the technical IT science support requirements that are comparable to our needs.
• You may annotate, highlight, or mark the document to point out relevant sections. Handwritten notes are acceptable.

18. Summary of Work Performed (Maximum 3 Pages)
Provide a summary of the work you actually performed under the contract.
• Do not restate the entire SOW—focus only on tasks you completed.
• Describe the nature, scope, and relevance of the work to our requirement.

19. Optional Attachment (Maximum 1 Page)
You may include **one optional chart or table** that summarizes or links both case reports. This is in addition to the narrative pages (3 pages max per case report).

Notes About Case Reports:

1. Information submitted in Step 1 remains part of the evaluation. Your selected Experience Case 1 and Case 2 contracts will also be used later in the Factor C – Past Performance evaluation.
2. All information you submit, including PWS/SOW materials, will be protected as "Source Selection Sensitive." However, you are responsible for redacting any customer- or contractor-sensitive information you believe should be protected, or for adding any necessary proprietary markings.
3. Do NOT submit any classified information under any circumstances. If you have any concerns or questions, contact the Contracting Officer immediately.