SELF-PERFORMED CALCULATION SHEET

INSTRUCTIONS FOR CALCULATION OF SELF-PERFORMED WORK IAW "Limitations on Subcontracting" (FAR 52.219-14 (Oct 2022) and/or FAR 52.219-17)

Offeror's are to identify self-performance IAW CFR Title 13: Business Credit and Assistance, Chapter I, PART 125—GOVERNMENT CONTRACTING PROGRAMS **§ 125.6 Prime contractor performance requirements (limitations on subcontracting).** https://www.ecfr.gov/current/title-13/chapter-I/part-125/section-125.6

SELF PERFORMED CALCULATIONS for Construction Firms, it will not pay more than 85% (75% for special trade contractors) of the amount paid by the government to it to firms that are not similarly situated. Any work that a similarly situated subcontractor further subcontracts will count towards the 85% subcontract amount that cannot be exceeded. Cost of materials are excluded and not considered to be subcontracted. *(See Page 3 for clarifications on "similar situated" entities).*

OFFEROR'S SELF PERFORMANCE WORKSHEET:

Offeror's are required to complete this Worksheet for this Proposal.

a) Offeror's total proposed price (base + option(s))	**$**_____
b) **Subtract** profit or fees	**$**_____
c) **Subtract** cost of materials	**$**_____
d) **Subtract** Offeror's total estimated cost of contract performance incurred for NON similar situated entities	**$**_____
e) Offeror's total estimated cost of contract performance for similar situated entities **(a-b-c-d=e)**	**$**_____
f) Offeror's percentage of *"similar situated" entities* work (**e/a** x 100% = %)	_____**%**

List of Proposed Prime Contractor and Subcontractors, their work activities and value:

Prime Contractor/Subcontractor	**Concern Status** (i.e., SB, 8(a), SDB, SDVOSB, HUBZone, etc.)	**Work Activities**	**$ Value**

(Can add additional sheet if necessary)

Attachment J03. Self-Performed Calculation Sheet
Solicitation Number: 75H701-24-R-00020

At completion of this Contract/**Task Order**, the awardee shall complete and submit the following calculations to the Contracting Officer for the actual results achieved.

a) Offeror's total proposed price (base + option(s))	**$_____**
b) **Subtract** profit or fees	**$_____**
c) **Subtract** cost of materials	**$_____**
d) **Subtract** Offeror's total estimated cost of contract performance incurred for NON similar situated entities	**$_____**
e) Offeror's total estimated cost of contract performance for similar situated entities **(a-b-c-d=e)**	**$_____**
f) Offeror's percentage of *"similar situated" entities* work (**e/a** x 100% = %)	**_____%**

Signed at submission of **Proposal**:

Name: _____ Title: _____

Signature: _____ Date: _____

Signed at completion of **Contract**:

Name: _____ Title: _____

Signature: _____ Date: _____

Definitions: "Concern Status" means the SBA determined status of the firm, the small business program status as that which qualified the prime contractor for the award, and that is considered small for the NAICS code the prime contractor assigned to the subcontract the subcontractor will perform. These include Small Business, 8(a) participants, Small Disadvantaged Businesses (SDB), HUBZone Small Business concerns, Service-Disabled Veteran-Owned Small Business (SDVOSB) concerns, and Economically Disadvantaged Women-Owned Small Business (EDWOSB) concerns and Women-Owned Small Business (WOSB) concerns eligible under the WOSB Program. If none of these apply, the concern would be a Large Business.

(FAR 52.219-14 Limitations on Subcontracting (Oct 2022)— "Similarly situated entity" means a first-tier subcontractor, including an independent contractor, has the same small business program status as that which qualified the prime contractor for the award, and that is considered small for the size standard under the North American Industry Classification System (NAICS) code the prime contractor assigned to the subcontract. An example of a similarly situated entity is a first-tier subcontractor that is a HUBZone small business concern for a HUBZone setaside or sole source award under the HUBZone Program.]

(13 CFR 125.6) **§ 125.6 What are the prime contractor's limitations on subcontracting?**

(a) *General.* In order to be awarded a full or partial small business set-aside contract with a value greater than the simplified acquisition threshold (as defined in the FAR at 48 CFR 2.101)" in paragraph (a) introductory text; and an 8(a) contract, an SDVOSB contract, a VOSB contract, a HUBZone contract, or a WOSB or EDWOSB contract pursuant to part 127 of this chapter, a small business concern must agree that:

(3) In the case of a contract for general construction, it will not pay more than 85% of the amount paid by the government to it to firms that are not similarly situated. Any work that a similarly situated subcontractor further subcontracts will count towards the 85% subcontract amount that cannot be exceeded. Cost of materials are excluded and not considered to be subcontracted.

(4) In the case of a contract for special trade contractors, no more than 75% of the amount paid by the government to the prime may be paid to firms that are not similarly situated. Any work that a similarly situated subcontractor further subcontracts will count towards the 75% subcontract amount that cannot be exceeded. Cost of materials are excluded and not considered to be subcontracted.

(c) *Subcontracts to similarly situated entities.* A small business concern prime contractor that receives a contract listed in paragraph (a) of this section and spends contract amounts on a subcontractor that is a similarly situated entity shall not consider those subcontracted amounts as subcontracted for purposes of determining whether the small business concern prime contractor has violated paragraph (a) of this section, to the extent the subcontractor performs the work with its own employees. Any work that the similarly situated subcontractor does not perform with its own employees shall be considered subcontracted SBA will also exclude a subcontract to a similarly situated entity from consideration under the ostensible subcontractor rule (§ 121.103(h)(4)). A prime contractor may no longer count a similarly situated entity towards compliance with the limitations on subcontracting where the subcontractor ceases to qualify as small or under the relevant socioeconomic status.

Example 1 to paragraph (c):

An SDVO SBC sole source contract is awarded in the total amount of $500,000 for hammers. The prime contractor is a manufacturer and subcontracts 51% of the total amount received, less the cost of materials ($100,000) or $204,000, to an SDVO SBC subcontractor that manufactures the hammers in the U.S. The prime contractor does not violate the limitation on subcontracting requirement because the amount subcontracted to a similarly situated entity (less the cost of materials) is excluded from the limitation on subcontracting calculation.

Example 2 to paragraph (c):

A competitive 8(a) BD contract is awarded in the total amount of $10,000,000 for janitorial services. The prime contractor subcontracts $8,000,000 of the janitorial services to another 8(a) BD certified firm. The prime contractor does not violate the limitation on subcontracting for services because the amount subcontracted to a similarly situated entity is excluded from the limitation on subcontracting.

Example 3 to paragraph (c):

A WOSB set-aside contract is awarded in the total amount of $1,000,000 for landscaping services. The prime contractor subcontracts $500,001 to an SDVO SBC subcontractor that is not also a WOSB under the WOSB program. The prime contractor is in violation of the limitation on subcontracting requirement because it has subcontracted more than 50% of the contract amount to an SDVO SBC subcontractor, which is not considered similarly situated to a WOSB prime contractor.