

Statement of work  
CDRL,  
And  
Tracking Tool  
(SCATT)



September 2011



# Agenda

- Overview & Introduction
- Brief History
- SCATT Tool Components
  - SOW Questionnaire
  - CDRL Wizard
  - CDRL Tracking Tool
- Who uses the SCATT Tool?
- What is a SOW?
- Practical Application



# Introduction

SCATT Content and Database Administrator  
C2S2.scatt@L-3com.com

Feb 2011 to present

L-3 subcontractor to QNA supporting SIAT

USMC – Systems Engineering, Interoperability,  
Architectures and Technology (SIAT)

WebPublisher.scatt@usmc.mil



# Mission Statement

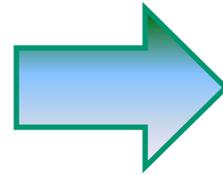
- Originally developed for the Marine Corps System Command;  
To assist the Program Offices in the Marine Corps System Command in developing performance-based SOWs and CDRL packages and to assist in tracking contractor performance after contract award.



# SCATT History



2001-2007



Aug 2007 - present

- Updates have been ongoing since the 2007 release date (note the version numbers of each functional area), as policies are updated and more information is received, the information is maintained and new functional area versions are released on the Web Version.

# Introduction

The SCATT tool is comprised of three separate applications

	<p>Web</p>	<p>The <b>SOW Questionnaire</b> contains a series of Yes or No questions to develop a draft SOW and CDRL package. Web-based tool.</p>
	<p>Local</p>	<p>The <b>CDRL Wizard</b> allows tailoring of draft CDRLs for submission to Contracts. Import XML into Access Database.</p>
	<p>Local</p>	<p>The <b>CDRL Tracking Tool</b> is utilized after Contract Award to follow program status and monitor contractor performance in the area of data deliverables.</p>

# SCATT Model

## SOW Questionnaire

Utilizing an IPT environment  
YES/NO questions develops:



- Draft SOW
- CDRL file



**Draft SOW**

XML

## CDRL WIZARD 2007

Import the XML file generated  
by the SOW Questionnaire into  
the CDRL Wizard Database  
and tailor the CDRLs.



**Draft CDRLs**

Final  
CDRLs

Program  
Events

## CDRL TRACKING TOOL 2007

Monitor contractor  
performance after  
contract award with the  
CDRL Tracker & produce  
status reports.



XML

Contract  
Award



# SOW Questionnaire

Version Information	
Functional Area	
Program and Data Management	
Government Furnished Property	
Meetings/Reviews	
Systems Engineering	
Human Systems Integration	
Open Architecture	
Producibility	
Testing/Verification	
Information Assurance	
Environmental, Safety, and Occupational Health	
Configuration Management	
Engineering Drawings	
Item Unique Identification	
Diminishing Manufacturing Sources	
Integrated Logistics Support	
Maintenance Planning	
Supply Support	
Power	
Technical Publications	
Support Equipment	

Functional Areas



# SOW Questionnaire

## Version Information

Functional Area	Complete?
Program and Data Management	No
Government Furnished Property	No
Meetings/Reviews	No
Systems Engineering	No
Human Systems Integration	Yes
Open Architecture	No
Producibility	No
Testing/Verification	No
Information Assurance	No
Environmental, Safety, and Occupational Health	No
Configuration Management	No
Engineering Drawings	No
Item Unique Identification	No
Diminishing Manufacturing Sources	No
Integrated Logistics Support	No
Maintenance Planning	No
Supply Support	No
Power	Yes
Technical Publications	No
Support Equipment	No

## Complete?

Yes or No indicates if ALL the questions in that FA have been completed



# SOW Questionnaire

			Version Information
Functional Area	Complete?	Lead	
Program and Data Management	No	Select Lead	<p><b><u>Lead</u></b> Drop down box to allows you to assign other team members to a Functional Area of your project</p>
Government Furnished Property	No	Select Lead	
Meetings/Reviews	No	Select Lead	
Systems Engineering	No	Select Lead	
Human Systems Integration	Yes	Select Lead	
Open Architecture	No	Select Lead	
Producibility	No	Select Lead	
Testing/Verification	No	Select Lead	
Information Assurance	No	Select Lead	
Environmental, Safety, and Occupational Health	No	Select Lead	
Configuration Management	No	Select Lead	
Engineering Drawings	No	Select Lead	
Item Unique Identification	No	Select Lead	
Diminishing Manufacturing Sources	No	Select Lead	
Integrated Logistics Support	No	Select Lead	
Maintenance Planning	No	Select Lead	
Supply Support	No	Select Lead	
Power	Yes	Select Lead	
Technical Publications	No	Select Lead	
Support Equipment	No	Select Lead	



# SOW Questionnaire

				Version Information
Functional Area	Complete?	Lead	Locked?	
Program and Data Management	No	Select Lead	No	
Government Furnished Property	No	Select Lead	No	
Meetings/Reviews	No	Select Lead	No	
Systems Engineering	No	Select Lead	No	
Human Systems Integration	Yes	Select Lead	No	
Open Architecture	No	Select Lead	No	
Producibility	No	Select Lead	No	
Testing/Verification	No	Select Lead	No	
Information Assurance	No	Select Lead	No	
Environmental, Safety, and Occupational Health	No	Select Lead	Yes	
Configuration Management	No	Select Lead	No	
Engineering Drawings	No	Select Lead	No	
Item Unique Identification	No	Select Lead	No	
Diminishing Manufacturing Sources	No	Select Lead	No	
Integrated Logistics Support	No	Select Lead	No	
Maintenance Planning	No	Select Lead	No	
Supply Support	No	Select Lead	No	
Power	Yes	Select Lead	No	
Technical Publications	No	Select Lead	No	
Support Equipment	No	Select Lead	No	

## Lead

Project Admin may assign other Users to a FA.

## Locked?

No = Allows changes to questions in FA

Yes = Questions in that FA have been answered by another user or you have not been assigned that FA by the Project Admin.



# SOW Questionnaire

Functional Area	Complete?	Lead	Locked?	Version Information	
				Latest	Project
Program and Data Management	No	Select Lead	No	1.0	----
Government Furnished Property	No	Select Lead	No	1.0	----
Meetings/Reviews	No	Select Lead	No	1.0	----
Systems Engineering	No	Select Lead	No	2.1	----
Human Systems Integration	Yes	Select Lead	No	2.2	2.2
Open Architecture	No	Select Lead	No	1.2	----
Producibility	No	Select Lead	No	1.0	----
Testing/Verification	No	Select Lead	No	1.0	----
Information Assurance	No	Select Lead	No	1.0	----
Environmental, Safety, and Occupational Health	No	Select Lead	Yes	1.2	1.2
Configuration Management	No	Select Lead	No	1.1	----
Engineering Drawings	No	Select Lead	No	1.1	----
Item Unique Identification	No	Select Lead	No	1.1	----
Diminishing Manufacturing Sources	No	Select Lead	No	1.1	----
Integrated Logistics Support	No	Select Lead	No	1.1	----
Maintenance Planning	No	Select Lead	No	1.0	----
Supply Support	No	Select Lead	No	1.1	----
Power	Yes	Select Lead	No	1.1	1.1
Technical Publications	No	Select Lead	No	1.1	----
Support Equipment	No	Select Lead	No	1.0	----

**Project**  
 This is the version your project is using.

**Red numbers:**  
 Version of FA has been updated since you last completed the FA.

**Green numbers:**  
 Started, but not complete



# SOW Questionnaire

		Version Information			
Functional Area		t	Notes	Actions	
Program and Data Management	<p style="text-align: center;"><b><u>Notes</u></b></p> <p>Provide info for each FA version.</p> <p style="text-align: center;"><b><u>Open</u></b></p> <p>Begins the SOW Questionnaire.</p> <p style="text-align: center;"><b><u>View</u></b></p> <p>Displays the list of Questions and Answers for the FA. (Very Useful!!)</p> <p style="text-align: center;"><b><u>Reset</u></b></p> <p>Resets all the answers for that FA.  <u>Note:</u> Once a Functional Area is completed, a reset is the only way to modify your answers.  <u>Hint:</u> Prior to resetting use the “View” link to save/print the previously answered questions for reference.</p>	----	<a href="#">Open</a>	<a href="#">View</a>	<a href="#">Reset</a>
Government Furnished Property		----	<a href="#">Open</a>	<a href="#">View</a>	<a href="#">Reset</a>
Meetings/Reviews		----	<a href="#">Open</a>	<a href="#">View</a>	<a href="#">Reset</a>
Systems Engineering		<a href="#">Notes</a>	<a href="#">Open</a>	<a href="#">View</a>	<a href="#">Reset</a>
Human Systems Integration		<a href="#">Notes</a>	<a href="#">Open</a>	<a href="#">View</a>	<a href="#">Reset</a>
Open Architecture		<a href="#">Notes</a>	<a href="#">Open</a>	<a href="#">View</a>	<a href="#">Reset</a>
Producibility		<a href="#">Notes</a>	<a href="#">Open</a>	<a href="#">View</a>	<a href="#">Reset</a>
Testing/Verification		----	<a href="#">Open</a>	<a href="#">View</a>	<a href="#">Reset</a>
Information Assurance		----	<a href="#">Open</a>	<a href="#">View</a>	<a href="#">Reset</a>
Environmental, Safety, and Occupational Health		<a href="#">Notes</a>	<a href="#">Open</a>	<a href="#">View</a>	<a href="#">Reset</a>
Configuration Management		<a href="#">Notes</a>	<a href="#">Open</a>	<a href="#">View</a>	<a href="#">Reset</a>
Engineering Drawings		<a href="#">Notes</a>	<a href="#">Open</a>	<a href="#">View</a>	<a href="#">Reset</a>
Item Unique Identification		----	<a href="#">Open</a>	<a href="#">View</a>	<a href="#">Reset</a>
Diminishing Manufacturing Sources		----	<a href="#">Open</a>	<a href="#">View</a>	<a href="#">Reset</a>
Integrated Logistics Support		<a href="#">Notes</a>	<a href="#">Open</a>	<a href="#">View</a>	<a href="#">Reset</a>
Maintenance Planning		----	<a href="#">Open</a>	<a href="#">View</a>	<a href="#">Reset</a>
Supply Support		<a href="#">Notes</a>	<a href="#">Open</a>	<a href="#">View</a>	<a href="#">Reset</a>
Power		<a href="#">Notes</a>	<a href="#">Open</a>	<a href="#">View</a>	<a href="#">Reset</a>
Technical Publications		----	<a href="#">Open</a>	<a href="#">View</a>	<a href="#">Reset</a>
Support Equipment		----	<a href="#">Open</a>	<a href="#">View</a>	<a href="#">Reset</a>



# Functional Areas

IROAN/Rebuild	Information Assurance	Power
Program and Data Management	ESOH	Technical Publications
Government Furnished Property	Configuration Management	Support Equipment
Meetings/Reviews	Engineering Drawings	Training Products and Services
Systems Engineering	Item Unique Identification	Packaging, Handling, Storage and Transportation
Open Architecture	Integrated Logistics Support	Contractor Performance Measurement
Producibility	Maintenance Planning	Transportability
Testing/Verification	Supply Support	Software
Supply Support	Parts Management (DMSMS)	14



# SOW Questionnaire

SCATT was designed for MCSC system/equipment acquisition programs coverings 26 functional areas

- Over 200 Yes/No questions,
  - View the SOW paragraphs
  - Data Item Descriptions (DIDs)
  - Add comments
- Project administrators can invite and assign team members to complete selected functional areas.
- Produces a draft SOW in .rtf and corresponding CDRLs in .xml. The draft SOW may be edited and the CDRLs tailored using the CDRL Wizard

## Manage Project Functional Areas

When all functional areas are complete, you may generate your Statement of Work and CDRL Package.

Functional Area	Complete?	Lead	Locked?	Version Information			Notes	Actions
				Latest	Project			
Program and Data Management	Yes	Select Lead	No	1.0	1.0	----	Open	<a href="#">View</a> <a href="#">Reset</a>
Government Furnished Property	Yes	Select Lead	No	1.0	1.0	----	Open	<a href="#">View</a> <a href="#">Reset</a>
Meetings/Reviews	Yes	Select Lead	No	1.0	1.0	----	Open	<a href="#">View</a> <a href="#">Reset</a>
Systems Engineering	Yes	Select Lead	No	2.0	2.0	<a href="#">Notes</a>	Open	<a href="#">View</a> <a href="#">Reset</a>
Human Systems Integration	Yes	Select Lead	No	1.0	1.0	<a href="#">Notes</a>	Open	<a href="#">View</a> <a href="#">Reset</a>
Open Architecture	No	Select Lead	No	1.2	1.2	<a href="#">Notes</a>	<a href="#">Open</a>	<a href="#">View</a> <a href="#">Reset</a>
Producibility	Yes	Select Lead	No	1.0	1.0	----	Open	<a href="#">View</a> <a href="#">Reset</a>
Testing/Verification	Yes	Select Lead	No	1.0	1.0	----	Open	<a href="#">View</a> <a href="#">Reset</a>
Information Assurance	Yes	Select Lead	No	1.0	1.0	----	Open	<a href="#">View</a> <a href="#">Reset</a>
Environmental, Safety, and Occupational Health	No	Select Lead	No	1.2	1.2	<a href="#">Notes</a>	<a href="#">Open</a>	<a href="#">View</a> <a href="#">Reset</a>
Configuration Management	Yes	Select Lead	No	1.0	1.0	----	Open	<a href="#">View</a> <a href="#">Reset</a>
Engineering Drawings	Yes	Select Lead	No	1.1	1.1	<a href="#">Notes</a>	Open	<a href="#">View</a> <a href="#">Reset</a>
Item Unique Identification	Yes	Select Lead	No	1.1	1.1	----	Open	<a href="#">View</a> <a href="#">Reset</a>
Diminishing Manufacturing Sources	Yes	Select Lead	No	1.1	1.1	----	Open	<a href="#">View</a> <a href="#">Reset</a>
Integrated Logistics Support	No	Select Lead	No	1.0	1.0	----	<a href="#">Open</a>	<a href="#">View</a> <a href="#">Reset</a>
Maintenance Planning	Yes	Select Lead	No	1.0	1.0	----	Open	<a href="#">View</a> <a href="#">Reset</a>
Supply Support	Yes	Select Lead	No	1.1	1.1	<a href="#">Notes</a>	Open	<a href="#">View</a> <a href="#">Reset</a>
Power	Yes	Select Lead	No	1.0	1.0	----	Open	<a href="#">View</a> <a href="#">Reset</a>
Technical Publications	Yes	Select Lead	No	1.1	1.1	----	Open	<a href="#">View</a> <a href="#">Reset</a>
Support Equipment	Yes	Select Lead	No	1.0	1.0	----	Open	<a href="#">View</a> <a href="#">Reset</a>
Training Products and Services	Yes	Select Lead	No	1.0	1.0	----	Open	<a href="#">View</a> <a href="#">Reset</a>
Packaging, Handling, Storage and Transportation	Yes	Select Lead	No	1.1	1.1	<a href="#">Notes</a>	Open	<a href="#">View</a> <a href="#">Reset</a>
Transportability	Yes	Select Lead	No	1.1	1.1	----	Open	<a href="#">View</a> <a href="#">Reset</a>
Software	Yes	Select Lead	No	1.1	1.1	----	Open	<a href="#">View</a> <a href="#">Reset</a>
Contractor Performance Measurement	No	Select Lead	No	1.1	1.1	<a href="#">Notes</a>	<a href="#">Open</a>	<a href="#">View</a> <a href="#">Reset</a>
<b>Test (Test &amp; 1)</b>	<b>No</b>			<b>84.1% complete</b>				<a href="#">Generate SOW</a>



# SOW Questionnaire

Open Architecture (2 questions)

[Return to Functional Areas List](#)

1. Is this program designated as a National Security System (NSS), or is this program software intensive or contains software intensive components, or has your Milestone Decision Authority (MDA), the Deputy Commander, Systems Engineering, Interoperability, Architectures, and Technology (DC SIAT), or Product Group Director indicated a requirement for an Open Architecture Assessment?

<<<

**System Messages:** Answering "No" to this question completes this Functional Area and returns you to the Functional Areas list.

[Question Clarification](#) | [SOW Paragraph](#) | [DID Information](#) | [Comments](#)

This question is derived from the Naval Open Architecture Contract Guidebook for Program Managers. The latest version of the Guidebook (version 2.0) dated 28 April 2010 is available at <http://acc.dau.mil/oa>. The term "NSS" refers to any telecommunications or information system operated by the United States Government, the function, operation, or use of which (1) involves intelligence activities; (2) involves cryptologic activities related to national security; (3) involves command and control of military forces; (4) involves equipment that is an integral part of a weapon or weapons system; or (5) is critical to the direct fulfillment of military or intelligence missions, but excluding any system that is to be used for administrative and business application purposes (including payroll, finance, logistics, and personnel management applications), 40 U.S.C. Section 1452, Information Technology Management Reform Act of 1996.

From the Guidebook: "Naval Open Architecture (NOA) is the confluence of business and technical practices yielding modular, interoperable systems that adhere to open standards with published interfaces. This approach significantly increases opportunities for innovation and competition, enables re-use of components, facilitates rapid technology insertion, and reduces maintenance constraints. NOA delivers increased warfighting capabilities in a shorter time at reduced cost. The Government's ability to acquire at least Government Purpose Rights (GPR) in technical data and computer software and to obtain rights in other intellectual property is critical to this effort.

"The Navy and Marine Corps have adopted OA as a way to reduce the rising cost of Naval warfare systems and platforms while continuing to increase capability delivery on shortened demand timelines.

"NOA is the Naval implementation of the Office of the Secretary of Defense's Open Systems Joint Task Force's (OSJTF) Modular Open System Approach (MOSA) that was first introduced in 2004. While MOSA and NOA each have five principles, there is a synergy between them. Each Naval



# CDRL Wizard





# CDRL Wizard

- The “Wizard” is a blank standalone Access database you download and run locally, contains DD Form 1423-1 (CDRL).
- Import draft CDRLs created by SOW Questionnaire (xml file)
- Draft CDRLs must then be tailored for your individual program
- Final CDRLs are then exported to MS Word for Contracts and xml format to import into the CDRL Tracking Tool
- Key features include:
  - A link to view the corresponding DID
  - Global changes to quickly update all CDRLs
  - Import CDRLs from SCATT Web Version
  - Dropdown boxes with standard entries IAW DoD 5010.12-M
  - Distribution Statements for Blocks 9 and 16



# CDRL Wizard

CDRL Wizard 2007 - [DD Form 1423-1]

File Edit View Tools Help

Sort CDRLs Global Changes Tool Tip Text Add Data Item Numbers Distribution Statements

By BLK A CLIN  
By BLK 1 Data Item  
By BLK 2 Title  
By BLK 4 Authority  
By BLK 5 Contract Ref.

Form Approved  
OMB No. 0704-0

Public reporting burden for this collection of information is estimated to average 15 minutes per response, including reviewing existing data sources, searching existing data sources, gathering the data needed, reviewing the collection of information, and completing and reviewing the collection of information. Send comments to Washington, DC 20503. Please do not return this information to the person who provided it.

A. CONTRACT LINE ITEM NO. \_\_\_\_\_

D. SYSTEM/ITEM WEBSITE TUTORIAL

E. CONTRACT/PR NO. \_\_\_\_\_

F. CONTRACTOR \_\_\_\_\_

1. DATA ITEM NO. A001

2. TITLE OF DATA ITEM CONFERENCE AGENDA

3. SUBTITLE \_\_\_\_\_

4. AUTHORITY (Data Acquisition Document No.) DI-ADMN-81249A

5. CONTRACT REFERENCE SOW para \_\_\_\_\_

6. REQUIRING OFFICE MARCORSYSCOI

7. DD 250 REQ LT

9. DIST STATEMENT REQUIRED A

10. FREQUENCY ASREQ

12. DATE OF 1ST SUBMISSION SEE BLK 16

14. DISTRIBUTION

8. APP CODE \_\_\_\_\_

11. AS OF DATE \_\_\_\_\_

13. DATE OF SUBSEQUENT SUBMISSION SEE BLK 16

a. ADDRESSEE \_\_\_\_\_

16. REMARKS

BLK 9 - The following information shall be included on the deliverable: DISTRIBUTION STATEMENT A: Approved for public release; distribution is unlimited.

BLK 12/13 - Submit \_\_\_ calendar days prior to each conference, meeting, audit, or review. The Government requires \_\_\_ calendar days to review. The contractor shall submit final \_\_\_ days after receipt of Government comments.

MCSC:	
(PM)	1



# CDRL Tracking Tool

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**CDRL**  
**TRACKING TOOL 2007**



# CDRL Tracking Tool

- The “Tracker” is a Microsoft Access database tool that is used after Contract Award
- Utilizes the Final CDRLs from the CDRL Wizard and key Program Events to track data submissions and monitor contractor performance
- Each Submission for all CDRLs can be scheduled in accordance with an actual date or tied to a Program Event
- Generates a wide range of reports that may be used for briefings on program status and contractor performance

# CDRL Tracking Tool

CDRL Tracking Tool 2007 - Main Menu

## CDRL Tracker



CDRL Tracker 2007  
12/20/07

Developed by:  
Marine Corps  
Systems Command

- Import CDRLs
- Edit CDRLs
- Add / Edit CDRLs
- Schedule CDRL Submissions
- Record CDRL Submissions
- DD 142
- Reports
- Export

**Schedule CDRL Submissions**

Select a CDRL

With the CDRLs imported into the Tracking Tool, the next step is to schedule all the submissions for each CDRL. Select a CDRL and click Next or simply double click on the CDRL. Click on the headings to sort the list.

Data Item #	Title
A001	VALIDATION REPORT
B001	CONFERENCE AGENDA
B002	CONFERENCE MINUTES
C001	ENGINEERING RELEASE RECORD (ERR)
C002	ENGINEERING CHANGE PROPOSAL (ECP)
C003	REQUEST FOR DEVIATION (RFD)
C004	NOTICE OF REVISION (NOR)
C005	CONFIGURATION AUDIT SUMMARY REPORT
C006	CONFIGURATION AUDIT SUMMARY REPORT
C007	CONFIGURATION STATUS ACCOUNTING
D001	ELECTROMAGNETIC INTERFERENCE TEST
D002	ELECTROMAGNETIC INTERFERENCE TEST
E001	CORROSION PREVENTION AND CONTROL
F001	BAR CODE IDENTIFICATION REPORT
F002	CONTRACTOR'S PROGRESS, STATUS AND
F003	CONTRACT WORK BREAKDOWN STRUCTURE (CWBS)
F004	HAZARDOUS MATERIALS MANAGEMENT
F005	CONTRACT PERFORMANCE REPORT (CPR)
F006	CONTRACT FUNDS STATUS REPORT (CFSR)
F007	INTEGRATED MASTER SCHEDULE (IMS)
G001	TECHNICAL REPORT - STUDY/SERVICES
G002	TECHNICAL REPORT - STUDY/SERVICES
G003	TECHNICAL REPORT - STUDY/SERVICES
H001	TEST PLAN

**Record CDRL Submissions**

**Step 1: Select a CDRL:**  
 F003 CONTRACT WORK BREAKDOWN STRUCTURE (CWBS) [Back] [Forward]

**Step 2: Select a Submission:** [View DID] [Remove] [Edit]

Status	Initial Due	Source
Appr-	11/4/2005	60 Days After Contract Award

**Step 3: Record Delivery Information (Select an Item from the List above):**

As Scheduled		Actual	
Initial Receipt from Contractor	11/4/2005	Initial Receipt from Contractor	11/1/2005
Days for Government Review		Days for Government Review	
Gov't Return to Cont'r w/Comments		Gov't Return to Cont'r w/Comments	
Days for Contractor to Submit Final		Days for Contractor to Submit Final	
Contractor Resubmit to Gov't		Contractor Resubmit to Gov't	

**Secondary Review Cycle (If Required)**

Gov't Return to Cont'r for further action	Planned Cont'r Return to Gov't	Actual Cont'r Return to Gov't
---	--------------------------------	-------------------------------

**STATUS**  
 **Approved**

**Government Approval**  
 Date: 11/5/2005 [Update] [Close] Notes (0)...

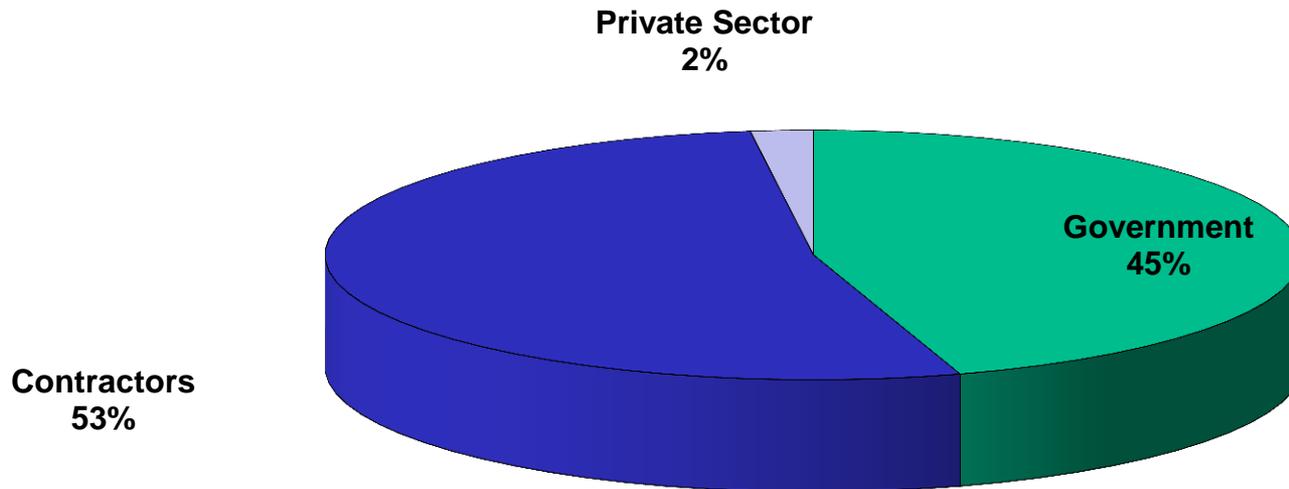


# Interest

- Web Version – Released on 1 Aug 07 SCATT has streamlined and standardized the development of draft SOWs for several hundred programs.
- SCATT Training – The full course is 8 hours in a computer lab and consists of both classroom instruction and hands-on application. The modified course is a half-day course conducted on-site.



# SCATT Metrics



**Current SCATT Users**



# Benefits

- Reduces the development time  
Development of an initial performance-based draft SOW and CDRL package does not require a “start from scratch” approach.
- Ensures current MCSC policy/procedures are included  
Helps eliminate major revisions of SOW/CDRLs during review.
- Provides a more complete product  
Specific questions are asked which were not considered and could have been omitted, if SCATT had not been used.
- Standard Format  
SCATT ensures proper format for SOW and CDRL packages by utilizing MIL-HDBK-245D guidelines and principles, thus assisting in standardizing these documents that form part of Section C of the RFP.

**Better SOW's – Better Contracts!**



# Backup Slides





# SOW / CDRL Guidance

- Before getting too far into the details of how SCATT works, it's important to understand the basics of a SOW, CDRL and DID.
- Since SCATT simply develops a DRAFT SOW and CDRL package, there is much work involved in tailoring the results of the SOW Questionnaire to meet your program needs.
- The strengths of the CDRL Wizard are usually only realized by those who are familiar with the process of completing the DD Form 1423-1 (CDRL).
- The CDRL Tracking Tool is of no use without understanding CDRLs and data deliverables.



# Request For Proposal

- Part I.
  - A. Solicitation/Contract Form
  - B. Supplies or Services and Prices/Costs
  - C. Description/Specifications/**Statement of Work**
  - D. Packaging and Marking
  - E. Inspection and Acceptance
  - F. Deliveries or Performance
  - G. Contract Administrative Data
  - H. Special Contract Requirements
- Part II.
  - I. Contract Clauses
- Part III.
  - J. List of Attachments (**CDRLs**, financial data, etc.)
- Part IV.
  - K. Representations, Certifications and Other Statements of Offerors
  - L. Instructions, Conditions, and Notices to Offerors
  - M. Evaluation Factors for Award



# SOW

- Describes the work to be done in developing or producing the goods to be delivered or services to be performed by a contractor
- To be written in performance terms by telling the vendor “What” you want them to do, not “How to” do it
- Sections: 1. Scope; 2. Applicable Documents; 3. Requirements

## References:

- MIL-HDBK-245D, Handbook for Preparation of Statement of Work
- Program Work Breakdown Structure (WBS)
- Acquisition Strategy or Technology Development Strategy (TDS)
- Initial Capabilities Document (ICD) or Capability Development Document (CDD)



# Section 1: Scope

- The SCOPE contains a “Brief Statement” of what the SOW should cover
- Address the breadth and limitations of the work to be done
- Background information should be limited to only provide the vendor with the basic acquisition requirement
- Work tasks, requirements and deliverable products should NOT be included

*1.0 Scope. This Statement of Work sets forth the effort required by the contractor for the manufacture, testing, production, delivery and support of the ABC System. It includes the associated program management, human engineering, manufacturing and logistic support efforts required to ensure compliance with the performance specification.*

*1.1 Background. The ABC System program has been initiated to procure, test and deploy a system that will lay and retrieve ABC's at a faster rate than the current method. Currently, the ABC System program has entered the Production & Deployment Phase (Milestone C) to procure the ABC System approved acquisition objective.*



# Section 2: Applicable Documents

*2.0 APPLICABLE DOCUMENTS. The following documents of the exact date and issue specified form a part of this Statement of Work to the extent specified herein. In the event of conflict between the applicable documents and this SOW, the SOW shall take precedence. All second tier and below references cited shall be considered as guidance only. Nothing in this document, however, supersedes applicable laws and regulations unless a specific exemption has been obtained.*

2.1 Military/Federal Standards and Specifications Mandatory

2.2 Military/Federal Standards and Specifications Guidance Only

2.3 Drawings

2.4 Handbooks (Guidance Only)

2.5 Other Government Documents

2.6 Non-Government Documents

2.7 Forms



# Section 3: Requirements

- Section 3 is the main portion of the SOW and contains all the requirements that the contractor must perform. All functional areas should be addressed:
  - Program and Data Management
  - Systems Engineering
  - Producibility
  - Environment, Safety, and Occupational Health
  - Configuration Management
  - Testing/Verification
  - Integrated Logistics Support
  - Open Architecture
  - Technical Publications
  - Support Equipment
  - Training Products and Services
  - Software
  - Contractor Performance Measurement



# DO's and DON'Ts

- Do:
  - Focus on “What” the contractor is to do
  - Be specific and write in clear, understandable terms to define the tasks
  - Know all reference documents and tailor them appropriately
  - Put data delivery information on the CDRL, not in SOW
- Don't:
  - Focus on “How” the task is to be performed
  - Be wordy and write broad and vague requirements that are open for interpretation
  - Use references just because they were used in the last SOW
  - Confuse the SOW with the Specification and include specific technical requirements



# SOW vs. SPEC

- A SOW defines all work performance requirements for contractor effort IAW MIL-HDBK-245D.
- A Specification describes the qualitative and quantitative technical performance requirements of the system/item being developed or produced IAW MIL-STD-961E.

EXAMPLE: The Specification may cite reliability and maintainability (R&M) requirements using mean-time-between-failures (MTBF) and mean-time-to-repair (MTTR), while the SOW might task the contractor to establish, implement, and control an R&M program.



# Rules For Writing

- Define all abbreviations and acronyms
- Use of “Shall” and “Will”
  - Shall = Mandatory Action by the contractor
  - Will = Government Action
- If possible state only one requirement each paragraph
- Avoid using these terms:

“Carefully performed”	“Accurate workmanship”
“Unless otherwise directed”	“As necessary”
“If required”	“As required”
“In the opinion of the contracting officer”	



# Consequences

- Poorly prepared SOWs can often lead to:
  - Confusion as to scope of work
  - Delays in vendor selection
  - Unnecessary litigation
  - Disputes and claims
  - Contract cost overruns
  - Strained vendor/Government relations



# Sample SOW Paragraph

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3.10.2 EMI Test Report. The contractor shall prepare and deliver an Electromagnetic Interference (EMI) test report documenting the compliance of the SLERD's EMI requirements of the contract specification.

DI-EMCS-80200B, Electromagnetic Interference Test Report (EMITR)



# Example SOW Paragraphs

Which SOW Paragraph should you use?:

a. The contractor will host the Post Award Conference 30 days after Contract Award. Other conferences and meetings may be held at contractor facilities as required.

b. The contractor shall host the Post Award Conference within 30 days of Contract Award. At the conference the contractor shall present management, key personnel, and program implementation processes.

c. The Government will host the Post Award Conference at a time to be determined. The contractor shall present management, key personnel, and program implementation processes.



# Preferred Method

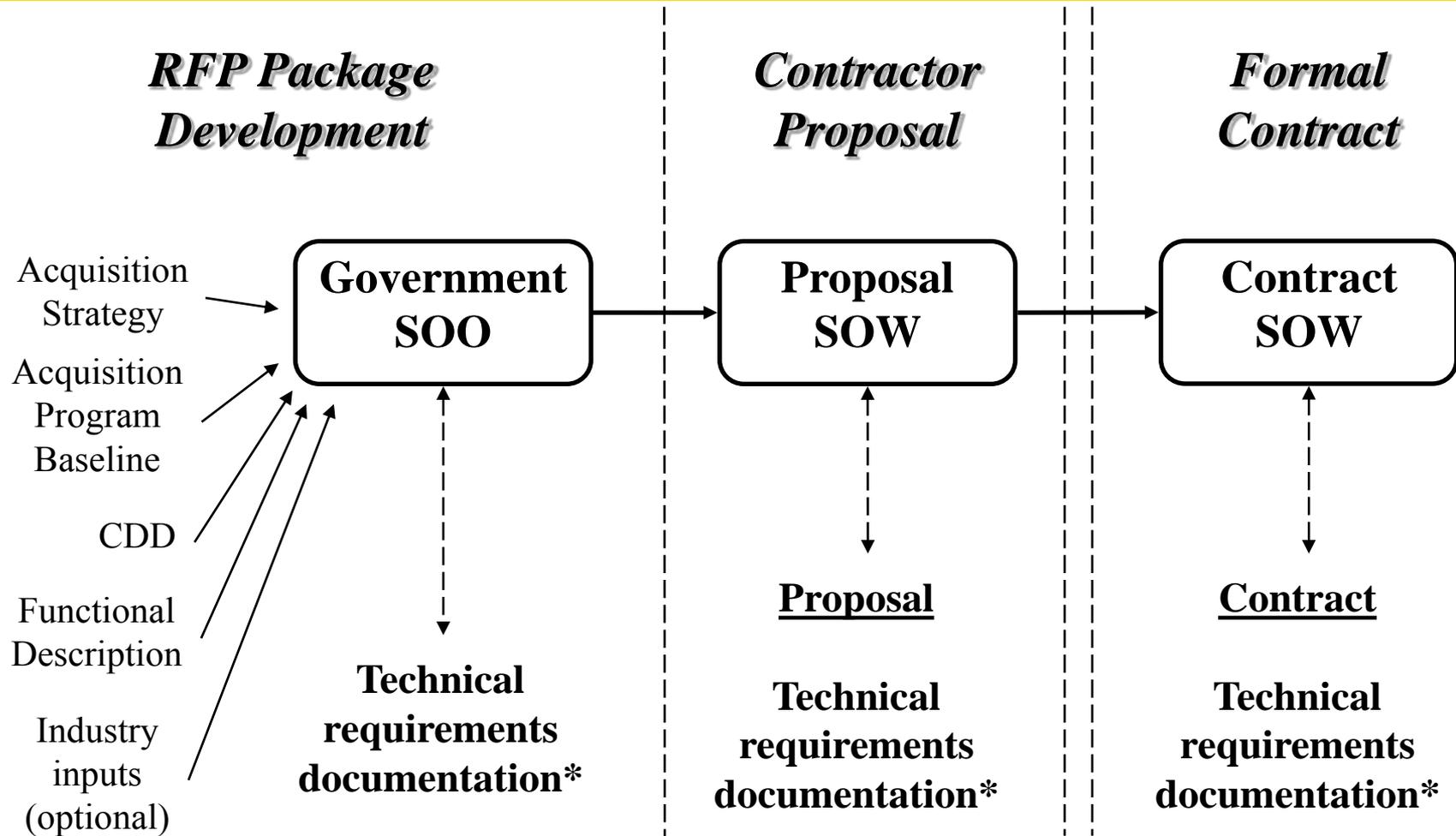
1. The Program Manager convenes a SOW IPT Meeting (usually 2-3 days long)
2. Review Program Status and Technology Development Strategy or Acquisition Strategy
3. Determine work requirements and data deliverables (if not already accomplished)
4. Develop the Draft SOW and CDRLs using SCATT and tailor to specific program needs



# Statement of Objectives

- A Statement of Objectives (SOO) is a Government prepared document that describes the basic, top-level objectives of the acquisition. The contractor uses the SOO to propose a SOW and CDRL package. The SOO is not a contract compliance item. (typically 2-4 pages)
- The SOO can be used where the intent is to provide the maximum flexibility to each offeror to propose an innovative development approach.
- The SOO provides the Government with an opportunity to assess the offeror's understanding of all aspects of the effort to be performed.
- Section 5 of MIL-HDBK-245D describes the SOO

# Statement of Objectives



\* Technical requirements can be changed due to performance/cost tradeoffs.



# CDRL

- Contract Data Requirements List (CDRL)
  - Also known as the DD Form 1423
  - Contractual vehicle that ties the DID to the SOW
  - Provides the delivery schedule for the Data Item
  - Allows the Program Office to tailor the DID using block 16 to meet their specific program needs
  - DoD 5010.12M, “Procedures for the Acquisition and Management of Technical Data” contains policy and guidance information on CDRLs



- Data Item Descriptions (DIDs):
  - Describe the data products to be delivered by the contractor
  - The DID itself cannot be changed, however certain requirements in the DID may not be necessary and can be tailored out using block 16 of the CDRL
  - Approved DIDs are listed in the Acquisition Streamlining and Standardization Information System (ASSIST), see [www.assistdocs.com](http://www.assistdocs.com).
  - DoD 5010.12M, “Procedures for the Acquisition and Management of Technical Data” contains policy and guidance information on DIDs





# Summary

- Be familiar with MIL-HDBK-245D in order to develop a well written, performance-based SOW or SOO
- SCATT is comprised of 3 separate applications: the SOW Questionnaire, CDRL Wizard, and CDRL Tracking Tool
- A DID may be tailored using the CDRL to only invoke the specific requirements that the contractor must meet
- ASSIST is the official database for DoD standard, specification, and DIDs: [www.assistdocs.com](http://www.assistdocs.com)
- SCATT is a “living” tool. Use the SCATT Web Version at <http://scatt.mkisystems.com> for the latest information