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 Administraton
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.
• 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:

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

SOW Questionnaire

Utilizing an IPT environment YES/NO questions develops:
- Draft SOW
- CDRL file

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

Draft CDRLs

Final CDRLs

Program Events

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

Contract Award
## Functional Areas

<table>
<thead>
<tr>
<th>Functional Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program and Data Management</td>
</tr>
<tr>
<td>Government Furnished Property</td>
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<tr>
<td>Meetings/Reviews</td>
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<tr>
<td>Systems Engineering</td>
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<tr>
<td>Human Systems Integration</td>
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<tr>
<td>Open Architecture</td>
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<td>Producibility</td>
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<tr>
<td>Testing/Verification</td>
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<td>Information Assurance</td>
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<td>Environmental, Safety, and Occupational Health</td>
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<tr>
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<td>Engineering Drawings</td>
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<td>Item Unique Identification</td>
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<tr>
<td>Diminishing Manufacturing Sources</td>
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<td>Integrated Logistics Support</td>
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<td>Maintenance Planning</td>
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<td>Supply Support</td>
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<tr>
<td>Power</td>
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<tr>
<td>Technical Publications</td>
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<tr>
<td>Support Equipment</td>
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### SOW Questionnaire

<table>
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<td>Support Equipment</td>
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</table>

**Complete?**

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

<table>
<thead>
<tr>
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<tbody>
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<td>Human Systems Integration</td>
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<td>Support Equipment</td>
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</table>

**Lead**
Drop down box to allows you to assign other team members to a Functional Area of your project.
# SOW Questionnaire

## Functional Areas and Lead/Locked Status

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<th>Lead</th>
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<td>Human Systems Integration</td>
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</tr>
<tr>
<td>Support Equipment</td>
<td>No</td>
<td></td>
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</tr>
</tbody>
</table>

**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

<table>
<thead>
<tr>
<th>Functional Area</th>
<th>Complete?</th>
<th>Lead</th>
<th>Locked?</th>
<th>Latest</th>
<th>Project</th>
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<tr>
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<td>Item Unique Identification</td>
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<td>Select Lead</td>
<td>No</td>
<td>1.0</td>
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</tr>
</tbody>
</table>

**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

## Functional Area

<table>
<thead>
<tr>
<th>Functional Area</th>
<th>Notes</th>
<th>Open</th>
<th>View</th>
<th>Reset</th>
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<td>Program and Data Management</td>
<td>Notes</td>
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<td>View</td>
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<td>View</td>
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<td>Meetings/Reviews</td>
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<td>View</td>
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<td>Support Equipment</td>
<td>Notes</td>
<td>Open</td>
<td>View</td>
<td>Reset</td>
</tr>
</tbody>
</table>

**Notes**

Provide info for each FA version.

**Open**

Begins the SOW Questionnaire.

**View**

Displays the list of Questions and Answers for the FA. (Very Useful!!)

**Reset**

Resets all the answers for that FA.

**Note:** Once a Functional Area is completed, a reset is the only way to modify your answers.

**Hint:** Prior to resetting use the “View” link to save/print the previously answered questions for reference.
# Functional Areas

<table>
<thead>
<tr>
<th>IROAN/Rebuild</th>
<th>Information Assurance</th>
<th>Power</th>
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<tr>
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<td>Meetings/Reviews</td>
<td>Engineering Drawings</td>
<td>Training Products and Services</td>
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<td>Systems Engineering</td>
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<td>Open Architecture</td>
<td>Integrated Logistics Support</td>
<td>Contractor Performance Measurement</td>
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<td>Maintenance Planning</td>
<td>Transportability</td>
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<td>Software</td>
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<td>Parts Management (DMSMS)</td>
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</table>
SCATT was designed for MCSC system/equipment acquisition programs covering 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.
Open Architecture (2 questions)

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?

Yes  No  Back

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
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

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.
CDRL Tracking Tool
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

Select a CDRL
With the CDRLs imported into the Tracking Tool, the next step is to schedule 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 REVISED (NOR)
C005 | CONFIGURATION AUDIT SUMMARY REPORT
C006 | CONFIGURATION AUDIT SUMMARY REPORT
C007 | CONFIGURATION STATUS ACCOUNTING
D001 | ELECTROMAGNETIC INTERFERENCE
D002 | ELECTROMAGNETIC INTERFERENCE
D003 | CORROSION PREVENTION AND CONTROL
F001 | BAR CODE IDENTIFICATION REPORT
F002 | CONTRACTORS PROGRESS, STATUS AND AS NEEDED
F003 | CONTRACT WORK BREAKDOWN STRUCTURE (CWBS)
F004 | HAZARDOUS MATERIALS MANAGEMENT
F005 | CONTRACT PERFORMANCE REPORT (CPR)
F006 | CONTRACT FUNDING STATUS REPORT (CF)
F007 | INTEGRATED MASTER SCHEDULE (IMS)
G001 | TECHNICAL REPORT - STUDY/SERVICES
G002 | TECHNICAL REPORT - STUDY/SERVICES
G003 | TECHNICAL REPORT - STUDY/SERVICES
H001 | TEST PLAN

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

Step 1: Select a CDRL:
F003 | CONTRACT WORK BREAKDOWN STRUCTURE (CWBS)

Step 2: Select a Submission:
View DID | Remove | Edit
--- | --- | ---

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 | 11/7/2005
Days for Government Review | | Days for Government Review |
Gov't Return to Contractor/Comments | | Gov't Return to Contractor/Comments |
Days for Contractor to Submit Final | | Days for Contractor to Submit Final |
Contractor Re-submit to Gov't | | Contractor Re-submit to Gov't |

Secondary Review Cycle [If Required]

Gov't Return to Contractor for further action | Planned Return to Gov't | Actual Return to Gov't |
--- | --- | ---

STATUS | Government Approval
--- | ---
Approved | Date | Notes [3]
--- | --- | ---

Update | Close
--- | ---
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
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/\textbf{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 (\textbf{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”
  “Unless otherwise directed”
  “If required”
  “In the opinion of the contracting officer”
  “Accurate workmanship”
  “As necessary”
  “As required”
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
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
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

**RFP Package Development**

- Government SOO
- Acquisition Strategy
- Acquisition Program
- Baseline
- CDD
- Functional Description
- Industry inputs (optional)
- Technical requirements documentation*

**Contractor Proposal**

- Proposal SOW
- Proposal
- Technical requirements documentation*

**Formal Contract**

- Contract SOW
- Contract
- Technical requirements documentation*

Negotiation

* 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
SAMPLE CDRL

CONTRACT DATA REQUIREMENTS LIST

Public reporting burden for this collection of information is estimated to average 110 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and submitting the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to Department of Defense, Washington Headquarters Services, Directorate for Information Operations and Reports, 1215 Jefferson Davis Highway, Suite 1204, Arlington, VA 22202-4302, and to the Office of Management and Budget, Paperwork Reduction Project (7040-0188), Washington, DC 20503. Please do not return your form to this office.

A. CONTRACT LINE ITEM NO.  B. EXHIBIT  C. CATEGORY:  TDP  TM  OTHER  
D. SYSTEM ITEM  TUTORIAL
E. CONTRACT/PR NO.  F. CONTRACTOR:

1. DATA ITEM NO.  A001  2. TITLE OF DATA ITEM  CONFERENCE AGENDA
3. AUTHORITY (Data Acquisition Document No.)  DI-ADMN-01249A
4. CONTRACT REFERENCE  SOW para
5. REQUIRING OFFICE  MCSC
6. DISTRIBUTION

7. DOC 250 REQ  LT  8. APP CODE
9. DIST STATEMENT REQUIRED
10. FREQUENCY
11. AS OF DATE
12. DATE OF 1ST SUBMISSION
13. DATE OF SUBSEQUENT SUBMISSION
14. DISTRIBUTION

15. PRICE GROUP
16. ESTIMATED TOTAL PRICE

17. PRICE

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

BLK 12 - Submit 30 days prior to each conference, meeting, audit, or review. Government has 10 days to review and the contractor has 5 days to submit final.
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.

- DoD 5010.12M, “Procedures for the Acquisition and Management of Technical Data” contains policy and guidance information on DIDs
Section L (Instructions) Offeror shall provide experience in developing training programs, etc.

Section M (Evaluation) Specifies importance of training programs, etc.

“3.5 The contractor shall develop a training plan IAW....”

DATA ITEM DESCRIPTION

<table>
<thead>
<tr>
<th>Training Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. PREPARATION INSTRUCTIONS</td>
</tr>
</tbody>
</table>

REFERENCE TO ON THE CDRL FORM
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

- SCATT is a “living” tool. Use the SCATT Web Version at http://scatt.mkisystems.com for the latest information