

Generic Statement of Work (SOW) Template

The Statement of Work (SOW) format herein is only meant to be a guide and is not necessarily all-inclusive; as such, contents should be tailored to the requirement. Consult your Organization's requirements and the acquisition process for further customization.

The client will need to prepare a SOW, for instance, when getting a work executed or acquiring a service but not solely relying on the Contractor's commercial description to define the requirement. In this situation, procurement professionals are tailoring the execution mechanism for tasks performed by the Contractor (e.g., program management services) to meet a particular Government need.

SOW Format

Following is a generalized SOW to guide the Procurement professionals to draft the specific operation, product and process information format:

Background

A variety of people with different perspectives and life experiences will read your SOW. Readers typically include Government and industry contracting personnel, managers, technical experts, accountants and lawyers. All these readers need to understand the SOW in a clear and concise manner; therefore, language selection is very important. Therefore, identified as the "Introduction," this section provides information needed to acquaint any reader with the basic acquisition & execution situation. The background information may:

- Identify the requirement in general terms;
- Describe why the project is being pursued and how it relates to other projects;
- Summarize any situation which needs to be tackled because of an impact of a statutory authority or regulations affecting the overall requirement; and
- Identify any background materials attached to the SOW.

Objectives

This section should provide a concise overview of:

- The contract effort goals and objectives; and
- How the results or end products will be used.

Scope

Provide a brief statement of what the Government expects to accomplish under the contract. It will describe the breadth and limitations of the contract effort. It should not include specific work tasks or a description of deliverable products with micro details.

Tasks

Sometimes identified as "Requirements" or "Work Requirements," this section defines the tasks that the Contractor must complete during contract performance. The description of task requirements will depend on the approach that is selected to describe the required **effort**.

- For a execution-based Work Statement, the directions given by the client are the key to successful completion of the everyday tasks. However, for a Performance-Based Work Statement, this section should describe requirements in terms of results required rather than the methods for completing the work. This latitude

will permit the Contractor to develop new and innovative ways to complete those tasks.

- For a Level of Effort Statement of Work, this section should identify all tasks that must be performed and the hours to be devoted to each task.
- For a Detailed Statement of Work, this section should describe how the service must be accomplished. It may include precise measurements, tolerances, materials, quality control requirements, and other Government requirements that control the processes of the Contractor.

This section must describe requirements in a way that permits Contractor personnel to perform the service without direct Government supervision. Contractor personnel must not be subject to the type of supervision and control usually prevailing between the Government and its employees. For example, a SOW may permit the Government to approve key personnel, but must not permit the Government to approve all personnel performing the service. The SOW needs to guide the contractor to utilize all the information which prevents the contractor from getting into trouble during the execution. But the SOW should also not include words (e.g., "use methods directed by the Client's Project Officer that appear to indicate that the Government is managing day-to-day operations. Other items to consider:

- Specify requirements clearly so that all readers can understand them.
- Reference only the absolute minimum applicable specifications and standards needed.
- Tailor specifications and other documents.
- Separate general information from direction.

Task Example

3.1 Task Areas

Include specific titles of all tasks for required performance.

- Task 4.1 Title as applicable
- Task 4.2 Title as applicable
- Task 4.3 Title as applicable

3.2 Project Milestones/Completion Dates (Estimates and as applicable)

| Task Number | Work Milestones | Projected Completion Date |
|-------------|--|---------------------------|
| | Describe in-process milestone as applicable (first for this task) | Date |
| | Describe in-process milestone as applicable (second for this task) | Date |
| | Describe in-process milestone as applicable (third for this task) | Date |
| | Describe in-process milestone as applicable | Date |
| | Describe in-process milestone as applicable | Date |

4.1 Task 1 - Title

Describe the specific service to be provided for this task. Include milestones that are to be accomplished as applicable and as identified on the milestone schedule. Milestones can include such things as preliminary reports or data submittals, attendance at meetings, etc.

4.2 Task 2 - Title

Describe the specific services to be provided. Include milestones that are to be accomplished as applicable and as identified on the milestone schedule. Milestones can include such things as preliminary reports or data submittals, attendance at meetings, etc.

4.3 Task 3 - Title

Describe the specific services to be provided. Include milestones that are to be accomplished as applicable and as identified on the milestone schedule. Milestones can include such things as preliminary reports or data submittals, attendance at meetings, etc.

Delivery

This section should clearly state:

- What the Contractor must deliver. If different tasks have different delivery requirements, they must be clearly identified.
- When the Contractor must deliver. This may be stated using actual dates, days after contract award, or using some other method that clearly marks the required delivery date.
- Where the Contractor must deliver the service. This may be stated as a location, an organization, a person identified by position (e.g., Contracting Officer’s Representative, a person identified by name or using some other description.)
- What documentation (if any) the Contractor must obtain from the Government to verify Government receipt of the delivery.
- Other items to consider: Include any associated review periods or incorporation of Government comments as applicable. Deliverables are different than task completion milestones. Milestones may not require a specific submittal. Include here the schedule for when final products such as data, reports or other items are required to be furnished to the primary requestor.

Example Deliverable Schedule

| Deliverable | Description | Quantity/Media | Date Completed |
|-------------|-----------------------------------|------------------------------------|----------------|
| 1 | Identify the specific deliverable | e.g. 5 printed copies and 1 CD-ROM | dd-mm-yyy |
| | Government review (as applicable) | | dd-mm-yyy |
| | Resubmit with Government comments | e.g. 5 printed copies and 1 CD-ROM | dd-mm-yyy |
| 2 | Identify the specific deliverable | As applicable | dd-mm-yyy |
| 3 | Identify the specific deliverable | As applicable | dd-mm-yyy |

Government-Furnished Property, Material, Equipment, or Information (GFP, GFM, GFE, or GFI)

This section should identify any Government-furnished property provided to the Contractor for contract task execution. This includes all Government-furnished property, such as Government-furnished material, equipment, or information. If the list of property is extensive, this section should identify where that list can be found. Before offering to provide any property, make sure that it will be available when required, where required, and in the condition required by the contract. Failure to meet Government-furnished property requirements often lead to a Contractor claim for an equitable adjustment to contract price, delivery, or other requirements.

Security

This section should identify any unique security requirements associated with contract performance (when applicable). These requirements may include, but are not limited to, such items as:

- Special pass or identification requirements;
- Special security clearance requirements; or
- Special escort requirements.

Travel

Describe any travel requirements that are to be encountered in the performance of the service(s).

Special Material Requirements

Describe requirements for any special materials that are to be encountered in the performance of the service(s).

Other Unique Requirements

Discuss any other unique requirements or considerations, e.g. - Unique Item Identification (UID) and Radio Frequency Identification (RFID).

Place of Performance

This section should identify where the contract will be performed. If performance will occur at multiple Government locations, this section should indicate which tasks must be completed where. If performance will be at the Contractor's facility, the SOW need only state that requirement.

Period of Performance

The period of performance may be stated using actual dates, days after contract award, or using some other method. If different periods of performance will apply to different tasks, the tasks and related periods of performance should be clearly identified.
