

MILITARY HANDBOOK
PREPARATION OF STATEMENT
OF WORK (SOW)

TO ALL HOLDERS OF MIL-HDBK-245B:

1. The following pages of MIL-HDBK-245B have been revised and superseded the pages listed:

<u>NEW PAGE</u>	<u>DATE</u>	<u>SUPERSEDED PAGE</u>	<u>DATE</u>
11	31 December 1987	11	1 June 1983
11A	31 December 1987	NEW PAGE	
12	1 June 1983	12	REPRINTED WITHOUT CHANGE
12A	(BLANK PAGE)		
37	31 December 1987	NEW PAGE	
38	31 December 1987	NEW PAGE	

2. **RETAIN THIS NOTICE AND INSERT BEFORE TABLE OF CONTENTS.**

3. Holders of MIL-HDBK-245B will verify that page changes and additions indicated above have been entered. This notice page will be retained as a check sheet. This issuance, together with appended pages, is a separate publication. Each notice is to be retained by stocking points until the military handbook is completely revised or canceled.

Custodian:

Army - AR

Preparing activity:

Army - AR

(Project MISC-A093)

AMSC N/A

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MISC

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e. Identify all organizations and persons that will participate in preparing the SOW. Determine the participants areas of responsibility. Those participating are usually personnel from the program office or the system project management organization, engineering, production management, logistics support, system effectiveness, procurement or comptroller (normally cost analysis specialists); each has a role to play in the total effort. This determination is based largely on the output of a, b, c, and d.

f. Review the list of work words contained in Appendix A and endeavor to use the list properly. Never describe work tasks in terms of data to be delivered. Be explicit as to what the Government's needs are expressed in terms of what work is to be accomplished. For example, do not indicate that the contractor shall prepare X plan as work to be accomplished. The word prepare is accommodated in block 10 of the DID as preparation instructions for data. The word plan in this case connotes the data or the deliverable. The preparer of the SOW must establish the actual work parameters using work words to task the contractor to perform what work is needed. The work inherently generates information that may be identified, recorded and delivered as contract data.

g. Ensure that the SOW specifies what is required; not how it should be accomplished. In addition, all references to other documents, and sub-tier references should be thoroughly reviewed to ensure that unnecessary requirements are not inadvertently imposed.

h. Prepare a detailed list, indicating the numerous items and the selected optional parts of the individual SOW. If more than one person is working on the draft, the list will aid in separating the areas of responsibility and ensuring coverage without overlap.

4.7.2 Development approach. After assessing the significant literature on the subject and obtaining the guidance of the responsible managers, professionals and specialists, the following approaches should be considered:

a. Divide the subject matter to be covered into its logical component parts.

b. Develop an outline of how the subject will be covered.

c. Identify those component tasks required that are already defined in existing military or federal specifications and standards or current practices. Ensure that these documents are contained in the list of reference documents in Section 2 of the SOW and then invoked in the requirements portion. Specify only that portion of the referenced document required to provide the minimal needs of the task. This scoping of the tasks will reduce the cost drivers to an absolute minimum.

d. Isolate those tasks that present technological or design problems and that will necessitate additional research.

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e. Single out those functions or aspects of the work that will require special care in presentation within the SOW.

f. Determine those areas where additional help will be required, if target dates are to be met, and seek out the needed assistance without delay.

4.7.3 Preparation responsibilities. Project managers, development managers, acquisition managers and logistic managers will be guided by this handbook in the compilation of the SOW requirements into one document as part of the acquisition package. The incumbent manager is responsible for the scheduling of the SOW preparation. The writer defines the specific program requirements in terms that establish definitive parameters for SOW content and distributes such information as may be necessary to the contributors in accordance with appropriate command instructions. As contributors respond, it is the writers responsibility to ensure that all material included in the SOW is properly presented and correctly edited. Although significant portions of the SOW may be prepared by other activities, the final responsibility for its content and presentation rests with the incumbent manager. As a check point, the SOW writer should take into consideration the guidance established herein for the potential constraints that may be imposed by various review boards that the acquisition documentation may encounter in the course of auditing the data requirements with each associated task that develops the information. The Specification and Data Review Board (SDRB) (see Appendix B) will ensure that each SOW reviewed conforms to the policy, guidance and procedures contained in this handbook.

4.8 Format and composition. Standardized format and composition serves to:

- a. Provide an orderly approach for SOW development, and eliminate omissions
- b. Provide essential program elements
- c. Simplify preparation and review
- d. Enhance utilization by the contractor
- e. Minimize risks of potential claims against the Government by a contractor
- f. Minimize risks of losing claims filed against a contractor by the Government
- g. Simplify resultant proposal review
- h. Reduce contract administration problems and costs

4.8.1 Standard format. The basic structure of the standard format for the SOW is as follows (subject to variations specified in Section 5 for various types of SOWs):

<u>Section</u>	<u>Title</u>
1	SCOPE
2	APPLICABLE DOCUMENTS
3	REQUIREMENTS

Normally, the flexibility available for arranging subsets of information within each section will satisfy the needs for program variations. Deviations from the standard format may be made by the writer when necessary to accommodate overriding program needs. Additional information and exceptions related to the standard format are as follows.

4.8.1.1 Title page and table of contents. A title page or cover should be provided for all SOWs. It should identify the SOW title, date preparation completed and organizational identity. See FIGURE 4 for typical title page layout and content. A table of contents should be used when the SOW exceeds five pages. The table of contents should follow the title page and have a format similar to that depicted in FIGURE 5.

4.8.1.2 Section 1 - Scope. This section includes a brief statement of what the SOW covers. It may include an introduction and background. In some cases pertaining to the Type 1 SOW, the use of an introduction or background (or both) is preferred. Separate indentures under this section are used in SOWs to accommodate complex acquisitions requiring lengthy discussions of background information. A discussion of background information should be limited to only that information needed to acquaint the proposer/contractor with the scenario. Directions to the contractor to perform work tasks or a discussion of data requirements or deliverable products shall never be included in this section.

4.8.1.3 Section 2 - Applicable documents. Applicable documents invoked by specific reference in the text of the SOW must be identified and listed in Section 2 of the SOW. Conversely, the applicability of all referenced documents listed in Section 2 of the SOW shall be specified to the extent necessary in Section 3 of the SOW to identify only that portion that is needed to solicit the effort required. This will enable the proposer/contractor to determine the documents that must be obtained to fully understand what has been specifically invoked in the requirements section. References shall normally be confined to documents currently available at the time of issuance of the SOW or solicitation, and will include identification number and title of each referenced document. Section 2 should not be prepared until the draft of Section 3 is completed in order to ensure that only the documents actually referenced in the requirements section are listed. The listing of applicable documents only in Section 2 without invoking them in the requirements section does not create an impacting condition upon the contractor. Improper reference to applicable documents has been a major cost driver due to interpretations that a document listed in Section 2 was required to be complied with in total if not specifically delineated in Section 3. Never use guidance documents on the SOW. Only contractually applicable tailored standards and so forth shall be used in a SOW. Guidance documents may be conveyed to the contractor in the Instructions for Bidders (IFB).

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APPENDIX B
SPECIFICATION AND DATA REVIEW
BOARD (SDRB)

10. GENERAL

10.1 Scope. This appendix provides general guidelines regarding organization and operation of Specifications and Data Review Boards (SDRBs). This appendix is not a mandatory part of this handbook. The information contained herein is intended for guidance only.

20. REFERENCED DOCUMENTS

20.1 Government documents.

20.1.1 Specifications, standards and handbooks. Unless otherwise specified, the following specifications, standards, and handbooks of the issue listed in that issue of the Department of Defense Index of Specifications and Standards (DODISS) specified in the solicitation form a part of this Appendix to the extent specified herein.

STANDARDS

MILITARY

MIL-STD-847 - Scientific & Technical Reports Prepared by or
for The Department of Defense, Format Requirements
For

MIL-STD-965 - Parts Control Program

(Copies of specifications, standards, handbooks, drawings, and publications required by contractors in connection with specific acquisition functions should be obtained from the contracting activity or as directed by the contracting officer.)

30. DEFINITIONS

30.1 Specifications and Data Review Board (SDRB). A SDRB is assigned responsibility to examine, review, evaluate, and approve or disapprove each proposed solicitation, contract, and contract regulation to meet the requirements of this Handbook and Command or Agency directives.

40. GENERAL REQUIREMENTS

40.1 Introduction. This section provides general guidelines regarding the organization and operations of SDRBs.

40.2 Organization. Each SDRB has a chairperson. An SDRB may have both permanent or Ad Hoc members.

40.2.1 Permanent Membership. Permanent members may be named and available to service on the board for such areas as:

- a. Source Document Applications
- b. Data Acquisition
- c. Computer Data and Software
- d. DOD Parts Control Program (MIL-STD-965)
- e. Configuration Management
- f. Engineering Documentation
- g. Human Engineering
- h. Integrated Logistic Support
- i. Quality Assurance and Product Assurance
- j. Selected Acquisition Information Management Systems (SAIMS)
- k. Safety
- l. Producibility Engineering and Planning
- m. Process Controls
- n. Scientific and Technical Reports (MIL-STD-847)
- o. Maintenance

40.2.2 Ad hoc members. AdHoc members may be named for (1) review of specific solicitations or (2) specific configuration items, or (3) specific classes of items, or (4) specific systems.

50. DETAILED REQUIREMENTS

50.1 Introduction. This section contains guidance for SDRB operations.

50.2 Initial review. The Secretary or the Chairperson may perform an initial review of the Statement of Work, the Contract Data Requirements List (CDRL, DD Form 1423) and the Document Summary List (DSL) in order to schedule meetings.

50.3 Records. The activity and results of each meeting of the SDRB are documented in minutes which are maintained in file. The SDRB meeting minutes will, at a minimum include: listing of members participating and identification of their respective organizational elements, a summary of agreements reached and pertinent notes and technical detail.