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MIL-HDBK-502B
18 April 2025

SUPERSEDING
MIL-HDBK-502A
8 March 2013

DEPARTMENT OF DEFENSE HANDBOOK

PRODUCT SUPPORT ANALYSIS

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FOREWORD

1. This handbook is approved for use by all Departments and Agencies of the Department of Defense (DoD).
2. This handbook provides guidance for the framework and descriptions governing performance of Product Support Analysis (PSA) during the life cycle of systems and equipment. To provide more affordable product support for materiel systems the DoD is focusing on total ownership cost throughout the life cycle. Achieving affordable support takes effective product support management across the product's life cycle.
3. This handbook offers guidance on conventional PSA as an integral part of the systems engineering process. The information contained herein is applicable, in part or in whole, to all types of materiel and automated information systems and all acquisition strategies. This handbook does not establish a set approach to product support. It offers examples and points to consider to help shape an overall thought process for materiel acquisitions.
4. The examples provided are just that—examples only. They are not meant to be a definitive solution. They are meant as a launch platform to give insights into an innovative solution to various problems.
5. It is understood that the term new not only applies to brand-new products but may also refer to a change or a major modification to a product.
6. All specific references to activities, sub-activities, SAE GEIA-STD-0007C Copyright © 2019, SAE TA-HB-0007-1A Copyright © 2023, and SAE TA-STD-0017A Copyright © 2022 are used with permission from SAE.

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1 SCOPE

1.1 Scope.

This handbook addresses the overall PSA process and its associated activities, the selection and tailoring of those activities to meet DoD program supportability objectives, and sample contract language for acquiring PSA deliverables. The handbook offers guidance on SAE TA-STD-0017A and should be used in conjunction with applicable SAE GEIA Logistics Product Data (LPD) guidance, as an integral part of the overall systems engineering process. The information contained herein is applicable, in part or in whole, to all types of materiel and automated information systems and all acquisition strategies. The focus of this handbook is to provide guidance to the members of the defense acquisition workforce who are responsible for the supportability of materiel systems or automated information systems. This handbook is for guidance only and cannot be cited as a requirement.

2 APPLICABLE DOCUMENTS

2.1 General.

The documents listed in this section are specified in sections 4, 5, or 6 of this handbook. This section does not include documents cited in other sections of this handbook or recommended for additional information or as examples.

2.2 Government Documents.

The following government documents, drawings, and publications form a part of this document to the extent specified herein. Unless otherwise specified, the versions of these documents are those cited in the solicitation or contract.

2.2.1 Specifications, Standards, and Handbooks.

The following specifications, standards, and handbooks form a part of this document to the extent specified herein.

DEPARTMENT OF DEFENSE STANDARDS

MIL-STD-881	-	Work Breakdown Structures for Defense Materiel Items
MIL-STD-882	-	System Safety
MIL-STD-11991	-	General Standard for Parts, Materials, and Processes
MIL-STD-3034	-	Reliability-Centered Maintenance (RCM) Process

DEPARTMENT OF DEFENSE HANDBOOKS

MIL-HDBK-245	-	Preparation of Statement of Work (SOW)
MIL-HDBK-470	-	Designing and Developing Maintainable Products and Systems
MIL-HDBK-1390	-	Level of Repair Analysis

(Copies of these documents are available online at https://assist.dla.mil or from the Standardization Document Order Desk, 700 Robbins Avenue, Building 4D, Philadelphia, PA 19111-5094.)

2.2.2 Other Government Documents, Drawings, and Publications.

The following government documents, drawings, and publications form a part of this document to the extent specified herein. Unless otherwise specified, the versions of these documents are those cited in the solicitation or contract.

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DEPARTMENT OF DEFENSE DIRECTIVES/INSTRUCTIONS (DoDD/DoDI)

DoDD 1322.18	-	Military Training
DoDD 5000.01	-	The Defense Acquisition System
DoDI 4140.01	-	DoD Supply Chain Materiel Management Policy
DoDI 4140.67	-	DoD Counterfeit Prevention Policy
DoDI 4151.19	-	Serialized Item Management for Life cycle Management of Materiel
DoDI 4151.20	-	Depot Maintenance Core Capabilities Determination Process
DoDI 4151.22	-	Condition Based Maintenance Plus (CBM+) for Materiel Maintenance
DoDI 4160.28	-	DoD Demilitarization (DEMIL) Program
DoDI 5000.02	-	Operation of Adaptive Acquisition Framework
DoDI 5000.74	-	Defense Acquisition of Services
DoDI 5000.75	-	Business Systems Requirements and Acquisition
DoDI 5000.80	-	Operation of the Middle Tier of Acquisition
DoDI 5000.81	-	Urgent Capability Acquisition
DoDI 5000.85	-	Major Capability Acquisition
DoDI 5000.87	-	Operation of the Software Acquisition Pathway
DoDI 5000.88	-	Engineering of Defense Systems
DoDI 5000.91	-	Product Support Management for the Adaptive Acquisition Framework
DoDI 5000.93	-	Use of Additive Manufacturing in the DoD
DoDI 5000.95	-	Human System Integration in Defense Acquisition
DoDI 5000.97	-	Digital Engineering
DoDI 8320.04	-	Item Unique Identification (IUID) Standards for Tangible Personal Property

(Copies of DoD Instructions are available at https://www.esd.whs.mil/Directives/issuances/dodi/ or from the Defense Technical Information Center, 8725 John J. Kingman Road, Suite 0944, Fort Belvoir, VA 22060-6218.)

DEPARTMENT OF DEFENSE MANUALS

DoDM 4140.26-V1	-	DoD Defense Integrated Materiel Management for Consumable Items: Item Management Coding Assignment
DoDM 4151.25	-	Reliability-Centered Maintenance (RCM)
DoDM 4160.21-V1	-	Defense Materiel Disposition: Disposal Guidance and Procedures
DoDM 4160.28-V2	-	Defense Demilitarization: Demilitarization Procedures
DoDM 4245.15	-	Management of Diminishing Manufacturing Sources and Material Shortages
		Joint Publication:
AMC-R 700-99, NAVSUPINST 4790.7, AFLCR 400-21, MCO P4410.22C	-	Wholesale Inventory Management and Logistics Support of Multi-Service Used Nonconsumable Items
DFARS Part 227	-	DFARS for Patents, Data, and Copyrights
DFARS Part 252	-	DFARS for Solicitations, Provisions, and Contract Clauses
DoD RAM-C Manual	-	Reliability, Availability, Maintainability, and Cost (RAM-C) Rationale Report Outline Guidance
CJCSI 5123.01I	-	Charter of the Joint Requirements Oversight Council and Implementation of the Joint Capabilities Integration and Development System
JCIDS Manual	-	Manual for the Operation of the Joint Capabilities Integration and Development System

(Applications for copies of DoD Manuals and Joint Publications are available online at https://www.esd.whs.mil/Directives/issuances/dodm/. Copies of DFARS documents are available online at https://www.acq.osd.mil/dpap/dars/dfarspgi/current/index.html.)

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DEPARTMENT OF DEFENSE GUIDEBOOKS

Condition Based Maintenance Plus Guidebook
Guide for Integrating Systems Engineering into DoD Acquisition Contracts
Product Support BCA Guidebook
Guidebook for Performance-Based Services Acquisition (PBSA) in the Department of Defense
Independent Logistics Assessment Guidebook
Corrosion Prevention and Control Planning Guidebook for Military Systems and Equipment
DoD Open Systems Architecture Contract Guidebook for Program Managers
Product Support Manager Guidebook
DoD Risk, Issue, and Opportunity Management Guide for Defense Acquisition Programs

(Copies of all guidebooks are available online at https://www.dau.edu, except Guide for Integrating Systems Engineering into DoD Acquisition Contracts, available at https://discover.dtic.mil/.)

DEFENSE ACQUISITION UNIVERSITY PUBLICATIONS

Integrated Product Support (IPS) Element Guidebook

(The IPS Element Guidebook is available online at https://www.dau.edu/.)

DEFENSE STANDARDIZATION PROGRAM OFFICE

SD-15 - Guide for Performance Specifications
SD-19 - Parts Management Guide
SD-22 - Diminishing Manufacturing Sources and Material Shortages
SD-26 - DMSMS and Parts Management Contracting Guide

(Copies of these document are available online at https://assist.dla.mil or from the Standardization Document Order Desk, 700 Robbins Avenue, Building 4D, Philadelphia, PA 19111-5094.)

DoD FORMS MANAGEMENT PROGRAM OFFICE

DD Form 250 - Material Inspection and Receiving Report
DD Form 1423 - Contract Data Requirements List

(Copies of DoD Management forms are available online at https://www.esd.whs.mil/Directives/forms/dd0001_0499/.)

FEDERAL PUBLICATION

FAR Part 1 - Federal Acquisition Regulations System
FAR Part 12 - Acquisition of Commercial Products and Commercial Services
FAR Part 15 - Contracting by Negotiation
FAR Part 46 - Quality Assurance
FAR Part 52 - Solicitation Provisions and Contract Clauses

(The electronic version of the FAR is available online at www.acquisition.gov.)

OFFICE OF MANAGEMENT AND BUDGET CIRCULARS

OMB Circular A-94 - Guidelines and Discount Rates for Benefit-Cost Analysis of Federal Programs

(The OMB Circular A-94 is available online at https://www.whitehouse.gov/omb/information-for-agencies/circulars/)

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SERVICE SPECIFIC DOCUMENTS

AD 2019-29	-	Enabling Readiness and Modernization Through Advanced Manufacturing
AD 2024-03	-	Army Digital Engineering

(Army Directive 2019-29 is available online at ARN19451_AD2019-29_Web_Final.pdf (army.mil))
(Army Directive 2024-03 is available online at ARN40932-ARMY_DIR_2024-03-000-WEB-1.pdf)

2.2.3 Non-Government Publications.

The following documents form a part of this document to the extent specified herein. Unless otherwise specified, the issues of documents are those cited in the solicitation or contract.

AIRLINES FOR AMERICA

A4A MSG-3	-	MSG-3: Operator/Manufacturer Scheduled Maintenance Development

(Copies of this publication may be purchased from Airlines for America. 1275 Pennsylvania Avenue, NW Suite 1300 Washington, DC 20004; Phone 202-626-4062; Email pubs@airlines.org.)

AMERICAN INTITUTE OF AERONAUTICS AND ASTRONAUTICS

ANSI/AIAA S-102.2.4	-	Capability-Based Product Failure Mode, Effects and Criticality Analysis (FMECA) Requirements
ANSI/AIAA S-102.2.18	-	Performance-Based Fault Tree Analysis Requirements

(Copies of these Standards may be purchased from American Institute of Aeronautics and Astronautics Publications Customer Service, P.O. Box 960, Herndon, VA 20172-0906; Phone 1-800-682-2422 or 703-661-1595; Email aiaamail@presswarehouse.com; online at https://www.aiaa.org/publications/books/How-to-Order)

INSTITUTE OF ELECTRICAL AND ELECTRONICS ENGINEERS

IEEE 15288.2	-	Standard for Technical Reviews and Audits on Defense Programs
IEEE 1633	-	Recommend Practice on Software Reliability

(A copy of this Standard may be purchased from the Institute of Electrical and Electronics Engineers Standards Store, 445 and 501 Hoes Lane, Piscataway, NJ 08854-4141 Phone: 1-732-981-0060; Email: contactcenter@ieee.org; online at IEEE SA - Standards Store)

INTERNATIONAL ELECTROTECHNICAL COMMISSION

IEC 61025	-	Fault Tree Analysis (FTA)

(Copies of the IEC 61025 may be purchased IEC Regional Centre for North America (IEC-ReCNA, 446 Main Street, 16th Floor Worcester, MA 01608; Phone (508) 755-5663; Email info@iec.ch; online at https://www.iec.ch)

SAE INTERNATIONAL

SAE 1001	-	Integrated Project Processes for Engineering a System
SAE 1010	-	Standard Practice for Manpower and Personnel
SAE 6906	-	Standard Practice for Human Systems Integration (HSI)
SAE ARP5580	-	Recommended Failure Modes and Effects Analysis (FMEA) Practices for Non-Automobile Applications
SAE AS1390	-	Level of Repair Analysis (LORA)

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SAE AS6081	-	Counterfeit Electrical, Electronic, and Electromechanical (EEE) Parts: Avoidance, Detection, Mitigation, and Disposition - Independent Distribution
SAE AS6174	-	Counterfeit Materiel; Assuring Acquisition of Authentic and Conforming Materiel
SAE AS6171	-	Test Methods Standard; General Requirements, Suspect/ Counterfeit, Electrical, Electronic, and Electromechanical Parts
SAE EIA-649	-	Configuration Management Standard
SAE EIA-836	-	Configuration Management Data Exchange and Interoperability
SAE GEB1	-	Diminishing Manufacturing Sources and Material Shortages (DMSMS) Management Practices
SAE GEIA-HB-0007	-	Logistics Product Data Handbook
SAE GEIA-STD-0007	-	Logistics Product Data
SAE GEIA-STD-0009	-	Reliability Program Standard for Systems Design, Development, and Manufacturing
SAE J1739	-	Potential Failure Mode and Effects Analysis (FMEA) Including Design FMEA, Supplemental FMEA-MSR, and Process FMEA
SAE JA1011	-	Evaluation Criteria for Reliability-Centered Maintenance (RCM) Processes
SAE JA1012	-	A Guide to the Reliability Centered Maintenance (RCM) Standard
SAE TA-HB-0007-1	-	Logistics Product Data Summaries Handbook
SAE TA-HB-0009	-	Reliability Program Handbook
SAE TA-STD-0016	-	Standard for Preparing a DMSMS Management Plan
SAE TA-STD-0017	-	Product Support Analysis

(Copies of the SAE documents may be purchased from the SAE International, Customer Service, 400 Commonwealth Drive, Warrendale, PA 15096-0001; Phone 1-877-606-7323; Email CustomerService@sae.org; https://www.sae.org)

3 DEFINITIONS

3.1 Logistics Product Data (LPD).

The LPD is the documented output of the PSA process consisting of detailed data pertaining to the identification of Product Support resource requirements of a product. See SAE GEIA-STD-0007 for LPD data element definitions.

3.2 Product Support Analysis (PSA).

The Systems Engineering analysis that is intended to create the package of support functions required to field and maintain the readiness and operational capability of major weapon systems, subsystems, and components, including all functions related to weapon system readiness. See SAE TA-STD-0017 for PSA definitions.

3.3 Product Support Analysis Plan (PSAP).

A document which identifies and integrates tailorable PSA activities, identifies management responsibilities, and outlines the approach toward accomplishing PSA activities to meet program requirements.

3.4 Other Definitions of Terms.

Other definitions and terms in this handbook may be found in the following locations:

3.4.1 Glossary of Defense Acquisition University Acronyms and Terms

https://www.dau.edu/glossary/Pages/Glossary.aspx

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3.4.2 DoD Dictionary of Military and Associated Terms

https://www.dtic.mil/doctrine/dod_dictionary/

3.5 Acronyms

ACRONYM	TERM
AAF	Adaptive Acquisition Framework
AAR	After-Action Reports
ACAT	Acquisition Category
AFI	Air Force Instruction
Ao	Operational Availability
AM	Additive Manufacturing
AS	Acquisition Strategy
BCA	Business Case Analysis
BCS	Baseline Comparison System
BIT	Built-In Test
CAGE	Contractor and Government Entity
CBM+	Condition Based Maintenance Plus
CBS	Capability-Based Assessment
CDD	Capability Development Document
CDR	Critical Design Review
CDRL	Contract Data Requirements List
CJCSI	Chairman of the Joint Chiefs of Staff Instruction
CLA	Core Logistics Analysis
CLINs	Contract Line Item Numbers
CLS	Contractor Logistics Support
COR	Contracting Officer's Representative
COSAL	Coordinated Ship Board Allowance List
CPD	Capability Production Document
DA	Department of the Army
DE	Digital Engineering
DEMIL	Demilitarization
DEVSECOPS	Development, Security, and Operations
DFARS	Defense Federal Acquisition Regulation Supplement
DID	Data Item Description
DLA	Defense Logistics Agency
DoD	Department of Defense
DoDD	Department of Defense Directive
DoDI	Department of Defense Instruction
DoDM	Department of Defense Manual
DMSMS	Diminishing Manufacturing Sources and Material Shortages
DRS	Data Rights Strategy
GPR	Government Purpose Rights
EBOM	Engineering Bill of Materials
ECP	Engineering Change Proposals
E-KPP	Energy Key Performance Parameter
EMD	Engineering and Manufacturing Development
ESOH	Environment, Safety, and Occupational Health
FAR	Federal Acquisition Regulations
FIR	Final Inspection Report
FMEA	Failure Modes and Effects Analysis
FMECA	Failure Mode, Effects and Criticality Analysis
FRACAS	Failure Reporting, Analysis and Corrective Action System
FTA	Fault Tree Analysis
FSR	Field Service Reports
GFE	Government Furnished Equipment
GFI	Government Furnished Information

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GFM	Government Furnished Materiel
GIDEP	Government-Industry Data Exchange Program
HAZMAT	Hazardous Materials
HSI	Human Systems Integration
IDE	Integrated Digital Design Environment
IDE-PS	Integrated Data Environment for Product Support
ICD	Initial Capabilities Document
ILA	Independent Logistics Assessments
IP	Intellectual Property
IPB	Illustrated Parts Breakdown
IPR	Intellectual Property Rights
IPS	Integrated Product Support
IPT	Integrated Product Team
IUID	Item Unique Identification
JAMMEX	Joint Additive Manufacturing Model Exchange
JCIDS	Joint Capabilities Integration and Development System
KPP	Key Performance Parameters
LCSP	Life Cycle Sustainment Plan
KSA	Key System Attribute
LORA	Level of Repair Analysis
LE	Logistics Engineer
LPD	Logistics Product Data
MBE	Model-Based Engineering
MBSE	Model-Based Systems Engineering
MDC	Maintenance Data Collection
MDD	Material Development Decision
MDA	Milestone Decision Authorities
MOD	Modification
MSA	Materiel Solution Analysis
MTA	Maintenance Task Analysis
O&S	Operation and Sustainment
OEM	Original Equipment Manufacturer
OMB	Office of Management & Budget
P&D	Production and Deployment
PBA	Performance Based Agreement
PBL	Performance Based Logistics
PBSA	Performance-Based Services Acquisition
PCA	Physical Configuration Audit
PDR	Preliminary Design Review
PEOs	Program Executive Officers
PHS&T	Packaging, Handling, Storage, and Transportation Requirements
PLCS	Product Life Cycle Support
PM	Program Manager
POL	Petroleum, Oil, and Lubricants
PPMx	Prognostics and Predictive Maintenance
PRR	Production Readiness Review
PSA	Product Support Analysis
PSB	Product Support Baseline
PSAP	Product Support Analysis Plan
PSM	Product Support Manager
PSP	Product Support Package
PSS	Product Support Strategy
RAM-C	Reliability, Availability, Maintainability, and Cost
R&M	Reliability and Maintainability
RCM	Reliability-Centered Maintenance
RFP	Request for Proposal
RPSTL	Repair Parts Special Tools List

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SE	Systems Engineering
SEP	Systems Engineering Plan
SIM	Serialized Item Management
SME	Subject Matter Expert
SMR	Source, Maintenance, and Recoverability
SOW	Statement of Work
T&E	Test and Evaluation
TMs	Technical Manuals
TDRS	Technical Data Rights Strategy
TEMP	Test Evaluation Master Plan
TMDE	Test, Measurement, and Diagnostic Equipment
TMRR	Technical Maturation and Risk Reduction
TPS	Test Program Sets
WBS	Work Breakdown Structure

4 GENERAL GUIDANCE

4.1 Purpose and Scope.

This section provides general information on key product support topics including PSA, factors that impact PSA, requirements, and LPD. It also provides external references for obtaining additional information on the product support management process.

4.2 PSA.

Developing a product support package includes a wide range of analyses and disciplines that are conducted within the systems engineering process as identified in the DoD Guide for Integrating Systems Engineering into DoD Acquisition Contracts. The goals of Product Support Analyses are to ensure that supportability is included as a system performance requirement and that the system is concurrently developed or acquired with the optimal support system and infrastructure. PSA includes the integration of various analytical techniques with the objective of designing and developing an effective and efficient Product Support Package. The primary techniques used in PSA are: Failure Mode, Effects and Criticality Analysis (FMECA), Fault Tree Analysis (FTA); RCM Analysis; Condition-Based Maintenance Plus (CBM+); Prognostic and Predictive Maintenance (PPMx); Health Monitoring System (HMS); Level of Repair Analysis (LORA); Maintenance Task Analysis (MTA); Failure Reporting, Analysis and Corrective Action System (FRACAS); Core Logistics Analysis (CLA); Source of Repair Analysis (SORA); and Depot Source of Repair (DSOR) Analysis. Please refer to Section 5 for detailed guidance on PSA. Each system acquisition should tailor their respective acquisition strategy to accommodate various needs within their program.

4.3 JCIDS Requirements.

The Joint Capabilities Integration and Development System (JCIDS) process exists to identify, assess, validate, and prioritize joint military capability requirements. The primary objective of JCIDS is to ensure that the capabilities required by the joint Warfighter to successfully execute their missions are identified with their associated operational performance criteria. JCIDS requirements are central to Product Support Analysis, forming the common thread between the analytical processes, from setting the Warfighter requirements to driving the actions required to achieve affordable readiness during the Operations & Support phase. Information on the JCIDS process can be found at https://www.DAU.edu.

4.4 PSA and Logistics Product Data.

PSA outputs serve as input to the LPD process to support follow-on PSA activities and evaluation of product support alternatives. LPD is a subset of this data and is defined by industry standard SAE GEIA-STD-0007 with the companion handbook SAE GEIA-HB-0007. Contract requirements for the LPD should be tailored and consistent with the planned support concept. In addition, the contract requirements should represent the minimum essential requirements to cost-effectively maintain the fielded system as well as foster source of

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support competition throughout the life of the system. PSA Plan and LPD should be tailored to include all required activities and LPD summaries. The Program Manager (PM) should coordinate government data requirements across program functional specialties to minimize redundant contract deliverables and inconsistencies. Ultimately, the LPD is utilized by the Product Support Manager (PSM) in building an optimized product support package, considering all elements of Product Support.

4.5 DoD Integrated Product Support Implementation Roadmap.

The DoD Integrated Product Support Implementation Roadmap (https://www.dau.edu/psrm) provides additional guidance on product support management and supportability analysis. Topics include policy, guidance, references, continuous learning modules, and service specific items. It also identifies the activities and outputs for the twelve IPS elements and provides information on major program key events and products. For broader guidance on the Defense Acquisition System, please refer to the Product Support Manager (PSM) Guidebook. https://www.dau.edu/tools/product-support-manager-psm-guidebook.

4.6 Item Unique Identification (IUID).

The PM will plan for and implement IUID to identify and track applicable major end items, configuration-controlled items, and U.S. Government-furnished property to enhance life cycle management of assets in systems acquisition and sustainment, and to provide more accurate asset valuation and property accountability. IUID planning and implementation will be documented in an IUID implementation plan linked to the program's Systems Engineering Plan (SEP) at Milestones A, B, and C referenced in the PSM Guidebook and DoDI 5000.88. DoDI 8320.04 identifies the procedures to determine IUID traceability and DoDI 4151.19 defines the requirements for Serialized Item Management for Life cycle of Management of Materiel.

4.7 Adaptive Acquisition Framework.

DoDI 5000.02 was cancelled and restructured to improve process effectiveness and implement the Adaptive Acquisition Framework (AAF). As a result, DoDI 5000.02 was renamed "Operation of the Adaptive Acquisition Framework". The Major Capability Acquisition Framework pathway milestones and phases are emphasized throughout the MIL-HDBK-502. For broader guidance on AAF, please refer to https://aaf.dau.edu/.

Traditional system acquisitions have taken a multi-year approach to complete all required analysis, documentation, and approvals. As all systems are not created equal in size and scope, DoD released the DoDI 5000.02 to allow more flexibility in the acquisition process. The AAF is separated into different pathways which allow the Program to be able to select the best method for their product. The pathways are divided into the Urgent Capability Acquisition, Middle Tier of Acquisition, Major Capability Acquisition. Software Acquisition, Defense Business System, and Acquisition of Services. DoDI 5000.91 includes how to tailor product support for each type of acquisition. The traditional acquisition pathway, which much of this handbook details is centered on the Major Capability Acquisition. The DoDI 5000.02 also allows for the combination of acquisition pathways to provide value not otherwise available through use of a single pathway. For more information about the various pathways please see the DoDIs in FIGURE 1.

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a. DoDI 5000.81 Urgent Capability Acquisition
b. DoDI 5000.80 Middle Tier of Acquisition
c. DoDI 5000.85 Major Capability Acquisition
d. DoDI 5000.87 Operation of the Software Acquisition Pathway
e. DoDI 5000.75 Defense Business Systems
f. DoDI 5000.74 Acquisition of Services

FIGURE 1. Adaptive Acquisition Framework DoDIs

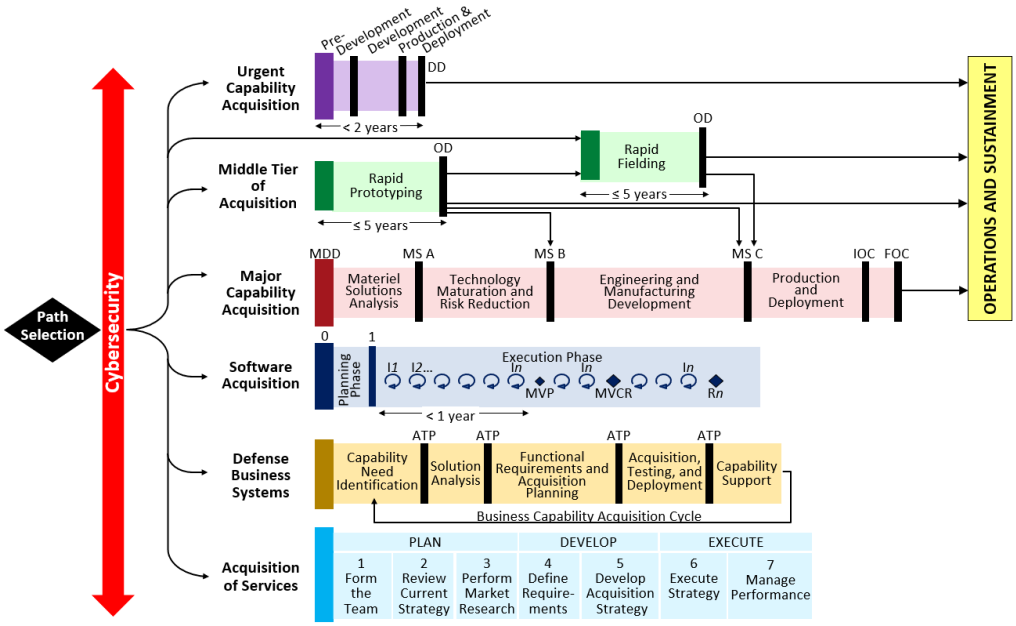


FIGURE 2. Adaptive Acquisition Framework pathways

The SAE TA-STD-0017A utilizes different naming conventions as compared to DoD life cycle phases. This is due to the standard being developed by a Non-Governmental Standards organization. The SAE suite of standards is utilized by industry and foreign governments which does not align perfectly with some DoD naming conventions.

TABLE I. Life cycle phases demonstrates the alignment with the SAE TA-STD-0017A life cycle phases and the traditional DoD life cycle phases. Detailed information on the life cycle phases in SAE TA-STD-0017A can be found in ANNEX B – PRODUCT SUPPORT ANALYSIS LIFE CYCLE PHASES. Throughout this handbook, life cycle phases will be referred to using the DoD naming convention.

TABLE I. Life cycle phases

SAE TA-STD-0017A Phases	DoD Traditional Phases Major Capability Acquisition
Preparation	Materiel Solution Analysis
Definition	Technical Maturation and Risk Reduction
Development	Engineering & Manufacturing Development
Production	Production and Deployment
In-Service Support	Operations and Support
Disposal	N/A

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5 DETAILED GUIDANCE

5.1 Introduction.

This section of the handbook provides rationale and guidance for the selection and tailoring of PSA activities in the most cost-effective manner to meet DoD program supportability objectives. Supportability objectives can be found in the PSM Guidebook. No requirements are contained in the PSM Guidebook. The users of the PSM Guidebook include those with a need to contract or perform PSA activities. The users may include the DoD contracting activities, government in-house activities, and prime contractors or subcontractors. The PSM Guidebook can be found at https://www.dau.edu/tools/product-support-manager-psm-guidebook.

5.1.1 How to use this Section.

This section provides structuring guidance for PSA as well as how to apply the individual activities and sub-activities defined in SAE TA-STD-0017A. The latest version of SAE TA-STD-0017A includes an updated numbering scheme in which PSA is divided into six general Activity Groups, each of which identifies activities and sub-activities that are typically accomplished iteratively throughout the life cycle of the prime product. Revision B of this handbook has a new structure intended to highlight the six general Activity Groups. The new structure also allows for the addition or subtraction of activities in future revisions without changing the base numbering scheme. In addition, it removes the implication that the activities are completed in a sequential order. An activity cross-reference between this standard, its predecessor, and MIL-STD-1388-1A is provided in Appendix C. The six general Activity Groups are:

a. Program Management, Surveillance, and Control

b. Supportability Objectives

c. Preparation and Evaluation of Alternatives

d. Determination of Product Support Resource Requirements

e. Product Operational In-Service Support

f. Supportability and Suitability Assessment

Appropriate service specific guidance may be necessary to supplement the guidance provided in this section. When a provisioning activity has comprehensive guidance that a contractor should follow that is too lengthy to include in a SOW, the governing document should be attached as an exhibit to the contract and referenced in the SOW (reference MIL-HDBK-245). Examples of governing documents are regulations, instructions, orders, and pamphlets.

5.1.2 Structuring Guidance.

PSA is an iterative and multidisciplinary activity with many interfaces. The PSA process can be divided into two general parts: (a) actualization of product support, and (b) assessment and verification of supportability. The iterative nature of this process and the input - output relationship of the interfaces change with the acquisition phases as described below.

5.1.3 Actualization of Product Support.

This portion of the PSA process commences at the system level to affect design and operational concepts; identify gross product support resource requirements of alternative concepts; and to relate design, operational, and supportability characteristics to system readiness objectives and goals. The system level analysis is characterized by application assessments, comparative analysis and cost/readiness driver identification, identification of technological opportunities, and tradeoffs between support, operational, and design concepts and between alternative support concepts such as organic versus contractor support, built-in versus external test capability, and varying numbers of maintenance levels. Once system level tradeoffs are made, the analysis shifts to lower system indenture levels and toward support system optimization within the framework established by the system level analysis. This analysis defines the product support resource requirements of the system through an integrated analysis of all operator and maintenance functions and tasks to determine task frequencies, task times, personnel and skill requirements, supply support requirements, etc., to include all

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elements of IPS. Optimization is achieved at lower indenture levels through allocation of functions and tasks to specific maintenance levels, repair versus discard analyses, RCM analyses, and formulating design recommendations to optimize maintenance times and product support resource requirements. Data from these analyses are documented within the LPD, which is subsequently used as direct inputs into the development of data products associated with each IPS element such as provisioning lists, personnel and training requirements, and technical manuals. This ensures compatibility between IPS element documentation and permits reutilization of data that applies to more than one Product Support element.

5.1.4 Assessment and Verification.

Assessment and verification is conducted throughout the system/equipment's life cycle to demonstrate, within stated confidence levels, the validity of the analysis, output products developed, and the adjustment of these products as required, based on results obtained. Plans for verification of support concepts are initiated early in the life cycle and continue through development, acquisition, deployment, and operations to include assessment and verification of post deployment support. The Independent Logistics Assessment Guidebook provides information on statutory, regulatory, and component required documentation which is reviewed and assessed for completeness and compliance prior to milestone decision.

5.1.4.1 Independent Logistics Assessments (ILA).

The ILA provides the logistics program status at key decision milestones in the materiel acquisition process and throughout the life cycle of the program. Specifically, the ILA identifies features that drive future Operation and Sustainment (O&S) costs, aid in early identification and mitigation of sustainment risk, changes to system design that could reduce costs, and effective strategies for managing costs. In addition, the ILA also enables PMs and military service leadership to gain a clear picture of the program's logistics health and its readiness for upcoming milestone decisions.

5.1.5 Interfaces.

Some of the major PSA activities where interfaces play a key role are listed below along with the interfacing activities:

a. Activity B.3, Comparative Analysis. Interfacing activities-Human Systems Integration (HSI), reliability, maintainability, environment, safety, occupational health, design engineers and IPS element managers.

b. Activities C.1.1 – C.1.11, Functional Requirements. Interfacing activities-design engineering, reliability, maintainability, HSI, safety and IPS element managers.

c. Activities C.3.1 – C.3.9, Evaluation of Alternatives and Tradeoff Analysis. Interfacing activities-design engineering, reliability, maintainability, affordability, safety, HSI, cost estimating, and IPS element managers.

d. Activity C.3.12, Facility Tradeoffs. Interfacing activities-facilities and infrastructure requirements into the product supportability process.

e. Activities D.1.1 – D.1.12, Task Analysis. Interfacing activities-reliability, maintainability, HSI, Packaging, Handling, Storage, and Transportation (PHS&T), Training, Tech Manuals, and Environment, Safety, and Occupational Health (ESOH).

f. Determination of Product Support Resource Requirements (Activities D.1 and D.2). Interfacing activities-design engineering, HSI, and IPS element managers.

5.1.5.1 Coordination of interfaces.

Coordination of these interfaces is a major challenge across the entire organizational structure. The activities in SAE TA-STD-0017A are structured to facilitate assignment of applicable activities to the community most directly involved without loss of overall task integrity. For a specific acquisition program, PSA interfaces will be described in the Activity A.2, Product Support Analysis Planning which should be reviewed to ensure that input-output relationships, responsibilities, and timing of activities are properly addressed to prevent overlap and duplication.

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5.1.5.2 Inputs and outputs for system level product support analysis.

Some of the system level PSA involves system analysis/engineering at the hardware-operating-support trade level (Activity C.3, Evaluation of Alternatives and Tradeoff Analysis). System level PSA is an input to and subset of these tradeoffs and is in turn a collection, synthesis, and "system" analysis of inputs from various specialized areas. The outputs from the system level PSA impact the interfacing activities and constitute boundary conditions or goals for specialized engineering programs and IPS element concepts and plans. In SAE TA-STD-0017A, each activity has a table which details the system inputs and outputs. PSA outputs serve as input to the LPD process that in turn support follow-on PSA activities and evaluation of product support alternatives.

5.1.5.3 Refinement and extension of the system level product support analysis.

As development progresses, the PSA is iterated and extended to lower indenture levels utilizing the input-output concept. Boundary conditions, constraints, and objectives are refined and expanded based on inputs from specialized engineering and IPS element areas. Additionally, the support system is optimized within the operational mission boundaries and objectives established for the integrated capability. Specific activity tradeoffs within engineering specialties and IPS elements are conducted to provide specific boundaries for follow-on efforts. These would include the Built-in test (BIT)/Built-in test equipment (BITE) versus external test tradeoffs and training tradeoffs (Activity C.3.5). FIGURE 3 is provided to clarify the input through output interfaces in a PSA Program.

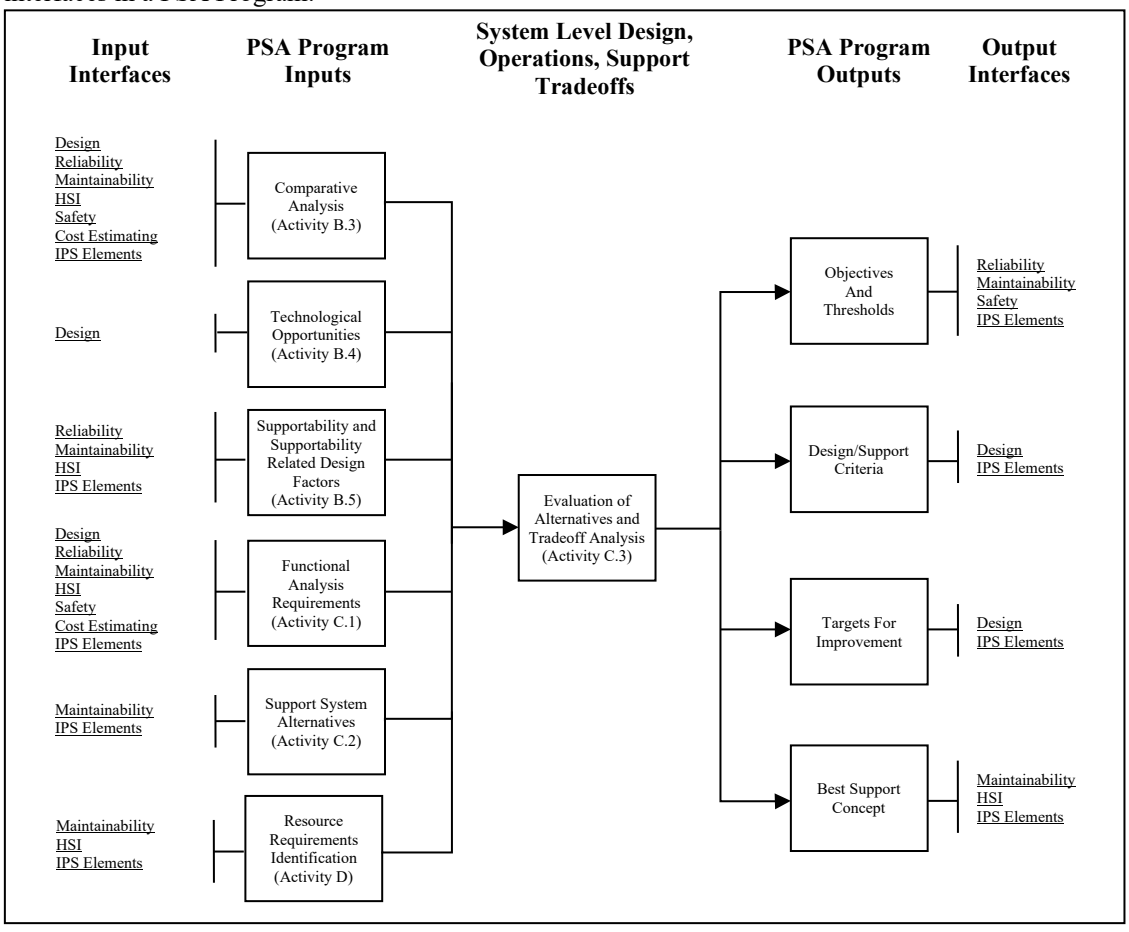


FIGURE 3. System level PSA interfaces

5.1.5.4 Activity D.1, Task analysis.

PSA is structured to serve an integrating function in providing source data for engineering and functional specialties such as PHS&T, Technical Manuals (TMs), Training, ESOH, HSI, Facilities, etc., regarding

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operator, maintainer, and support personnel task requirements. This source data is intended to serve as input to the analytical requirements of these specialties.

5.2 Activities D.1 and D.2, Resource Requirements Identification.

This step in the PSA process involves identification of all product support resource requirements. This involves many inputs from design and specialized engineering areas and all resource requirements are summarized in the LPD repository. These requirements are then fed to the various IPS element owners for use in further development of management plans and products for individual IPS elements.

5.3 Major Criteria.

Major system acquisition policies are contained in DoDI 5000.02. The PSA process directly impacts supportability and cost factors associated with a system/equipment. Therefore it is a significant consideration in system/equipment and sustainment decisions. While specific criteria and emphasis will vary from one acquisition to another, cost, affordability, manpower and personnel constraints, and system readiness are outputs of the PSA process and affect acquisition decisions. These are described in 5.3.1 through 5.3.4.

5.3.1 Cost.

The objective is to acquire high-quality, capable, and affordable systems that meet user needs. To achieve this, the affordability of a product should be evaluated by considering support investment costs, Operations and Support (O&S) costs, and other acquisition costs. Life cycle cost estimates are used to compare investment and recurring ownership costs for different system alternatives, taking into account the support resources needed to achieve specified readiness levels, including system reliability and maintainability, usage rates, and operating scenarios. Sensitivity analyses are conducted to identify and weigh the various factors driving costs, mitigating uncertainty in estimating resource costs such as manpower and energy. This analysis is crucial for understanding and managing program risk.

5.3.2 Affordability.

All major elements of life cycle cost should be addressed as part of the system analysis and control activities. The objective is to minimize cost within major constraints such as readiness requirements. Ongoing assessments of life cycle costs during a product's acquisition and continuing through its service life provide important insight to effective life cycle management. These assessments are required not only because costs change over time, but also because what constitutes acceptable affordability is also subject to change. What is affordable under one set of economic conditions may be unaffordable under another. Therefore, it is important to investigate opportunities to reduce the total ownership cost throughout all phases of a system's life cycle.

5.3.3 Manpower and Personnel Constraints.

Studies indicate the current problems with manpower and personnel shortages (in terms of quantity, skill specialty, and skill level) will continue for the next decade or more. The problem is of such magnitude that it should be approached through the design process as well as the more traditional manpower and personnel approaches of services. New system/equipment manpower quantities and skill level demands should be managed like other major design parameters, such as maintainability features, performance, and weight, beginning with the earliest conceptions of the new system/equipment. For additional information, refer to SAE 1010, SAE 6906, and DODI 5000.95.

5.3.4 System Readiness.

Product Support related design parameters (such as Reliability and Maintainability (R&M)), product support resources (such as spares and manpower), and logistic system parameters (such as resupply time) are related to system readiness objectives and goals. Such objectives may vary from system to system and from peacetime to wartime. Peacetime and wartime system readiness objectives will differ due to usage rate, operational modes, mission profiles, and operational environments. Examples of materiel readiness objectives include operational availability at peacetime usage rates, operational availability at wartime usage rates, sortie generations per given timeframe (aircraft), and maximum administrative and logistics downtime (intermittent missions).

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System readiness measures are as significant as cost, schedule, performance, and supportability, and should be managed accordingly, beginning with the earliest conception and design of new systems/equipment.

5.4 Activity/Overview.

The following sections of this handbook will provide an overview of each Activity that is contained in SAE TA-STD-0017A. SAE TA-STD-0017A defines 20 Activities. Each Activity has the following sections: Purpose, Required For, When Required, Applicable LPD Summaries, Associated Standards, Associated Products, Responsibility, LPD Documentation, sub sections to describe each one of the Sub Activities, and an Additional Information section containing pertinent information.

5.4.1 Purpose.

This section of the Activity Overview describes the subject matter of the Activity.

5.4.2 Required for.

This section of the Activity Overview describes the overall requirements of the Activity.

5.4.3 When Required.

This section of the Activity Overview indicates the phase of the DoD Acquisition Life Cycle previously mentioned above. Available phases are Materiel Solution Analysis (MSA), TMRR, EMD, and PD/OS.

5.4.4 Applicable LPD Summaries.

This section of the Activity Overview describes the available LPD summaries illustrated in SAE TA-HB-0007-1A which can be generated from the execution of this Activity. Summaries will be titled LSA-XXX where XXX is the associated number of the summary. See Appendix E for LPD summary titles and descriptions. An example of a summary is LSA-007 – Support Equipment Requirements. This lists the best available summary(ies) that could be produced. It can vary between a single summary to a listing of many available summaries. Caution and care should be exercised when considering which summaries can be produced using a software tool.

5.4.5 Associated Standards.

This section of the Activity Overview describes standards that can be utilized during the execution of this Activity. Various data and process standards are created and maintained through standards organizations such as American Institute of Aeronautics and Astronautics (AIAA) or SAE International. An example of a process standard is Performance-Based Product Failure Mode, Effects and Criticality Analysis (FMECA) Requirements, also known as AIAA S-102.2.4.

5.4.6 Associated Products.

This section of the Activity Overview describes the list of documents or deliverables that can be affected or created by the execution of this Activity. Examples of potential DoD acquisition documents include, but are not limited to, Life Cycle Sustainment Plan (LCSP), Acquisition Strategy (AS), Test and Evaluation Master Plan (TEMP), System Engineering Plan (SEP), WBS, and PSAP.

5.4.7 Responsibility.

This section of the Activity Overview describes who has the overall responsibility of the execution of the Activity. Execution of the Activity can solely rely on the Government, be acquired via a contractor, or can be a joint effort between the contractor and Government. But ultimately the responsibility the completion of the Activity relies on the Government. Other useful information can also include the life cycle phase in which the Activity is performed, though execution may not be mandatory in each phase. Refer to the Tailoring Tables located in section 5.11.15 or TABLE II of this document for each specific Sub Activity.

5.4.8 LPD documentation.

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This section of the Activity Overview describes what LPD documentation or SAE GEIA-STD-0007C data is produced when this Activity is executed. There are several different Entities that can be generated during this Activity. The available Entities are: X Entities (Cross Functional Requirements), A Entities (Operations and Maintenance), B Entities (Reliability Requirements and Analysis), C Entities (Task Analysis), G Entities (Skill and Training Requirements), E Entities (Support Equipment Data), U Entities (Unit Under Test Requirements), F Entities (Facility Requirements), J Entities (Transportability Requirements), H Entities (Provisioning and Cataloging Requirements), and S Entities (Hazardous Material Identification). Refer to SAE GEIA-STD-0007C for a complete definition of the data. Caution and care should be exercised when considering which LPD documentation can be produced using a software tool.

5.4.9 Activity breakdown.

This section of the Activity Overview describes the potential Sub Activities of the Activity under description. Each of the 20 Activities within SAE TA-STD-0017A are broken down into several Sub Activity sections within this handbook. There are at least the same number of sections in this handbook for the number of Sub Activities. For example, there are four sub sections of Activity B.2 (Support System Standardization). Activity B.2 is divided into four Sub Activities: B.2.1 (Support Resource Standardization), B.2.2 (Standardization Costs), B.2.3 (Hardware/Software Standardization Approaches) & B.2.4 (Standardization). Refer to SAE TA-STD-0017A for a complete definition of each Activity and its Sub Activities. Activity B.2 and its Sub Activities will be further defined later within this handbook.

5.4.10 Additional Information.

This section will cover additional information regarding the Activity. The Activities listed in Section 5 of this document are related to summaries described in SAE TA-HB-0007-1 and displayed in FIGURE 4.

LSA SUMMARIES		001	003	004	005	006	007	008	009	010	011	012	013	014	016	018	019	020	021	022	023	024	025	026	027	030	032	033	036
Activity	**Title**																												
A	**Program Management, Surveillance, and Control**																												
A.1	Product Support Strategy																												
A.2	Product Support Analysis Planning																												
A.3	Program and Design Reviews																												
A.4	Integrated Data Environment for Product Support (IDE-PS)																												
B	**Supportability Objectives**																												
B.1	Application and Usage Assessment																					X							
B.2	Support System Standardization							X			X	X	X	X									X	X	X				
B.3	Comparative Analysis	X										X					X					X							
B.4	Technological Opportunities																												
B.5	Supportability and Supportability- Related Design Factors		X	X								X						X				X	X						
C	**Preparation and Evaluation of Alternatives**																												
C.1	Functional Requirements				X		X	X	X		X	X	X	X	X	X			X			X	X	X	X			X	X
C.2	Support System Alternatives							X			X	X	X	X									X	X	X				
C.3	Evaluation of Alternatives and Tradeoff Analysis										X	X	X	X									X	X	X				X
D	**Determination of Product Support Resource Requirements**																												
D.1	Task Analysis	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
D.2	Early Distribution and Fielding Analysis						X								X							X	X	X	X				X
E	**Product Operational In-Service Support**																												
E.1	DMSMS Management, Obsolescence Management, and Counterfeit Prevention										X																		X
E.2	Field Feedback																												
E.3	Disposal Analysis																												X
E.4	In-Service Supportability	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
F	**Supportability and Suitability Assessment**																												
F.1	Supportability and Suitability Test, Evaluation, Verification and Validation	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
F.2	Supportability Performance Assessment																	X											

FIGURE 4. Summaries Matrix

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LSA SUMMARIES		037	039	040	046	050	051	055	056	058	065	068	070	071	072	074	075	076	077	078	080	085	126	151	152	154	155	
Activity	Title																											
A	**Program Management, Surveillance, and Control**																											
A.1	Product Support Strategy																											
A.2	Product Support Analysis Planning																											
A.3	Program and Design Reviews																											
A.4	Integrated Data Environment for Product Support (IDE-PS)																											
B	**Supportability Objectives**																											
B.1	Application and Usage Assessment																						X					
B.2	Support System Standardization	X												X	X	X	X	X	X	X								
B.3	Comparative Analysis																											
B.4	Technological Opportunities																											
B.5	Supportability and Supportability- Related Design Factors					X												X										
C	**Preparation and Evaluation of Alternatives**																											
C.1	Functional Requirements	X	X	X	X	X	X	X	X	X		X	X	X	X	X	X	X	X	X	X		X					
C.2	Support System Alternatives	X												X	X	X	X	X	X	X								
C.3	Evaluation of Alternatives and Tradeoff Analysis	X		X	X									X	X	X	X	X	X	X	X		X					
D	**Determination of Product Support Resource Requirements**																											
D.1	Task Analysis	X	X	X	X	X	X	X	X		X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
D.2	Early Distribution and Fielding Analysis									X								X										
E	**Product Operational In-Service Support**																											
E.1	DMSMS Management, Obsolescence Management, and Counterfeit Prevention		X		X																							
E.2	Field Feedback																											
E.3	Disposal Analysis		X		X							X									X							
E.4	In-Service Supportability	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
F	**Supportability and Suitability Assessment**																											
F.1	Supportability and Suitability Test, Evaluation, Verification and Validation	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
F.2	Supportability Performance Assessment							X	X																			

FIGURE 4. Summaries Matrix, continued

5.5 Activity Group A, Program Management, Surveillance, and Control.

The Program Management, Surveillance, and Control defines an approach to the establishment of the Product Support program ensuring that product availability is maximized while minimizing the cost and logistics footprint. The goal of the Product Support program is to achieve the best value while considering availability and cost. These objectives provide the strategy, detail planning initiatives, program reviews, and comprehensive data environment to successfully execute a Product Support Program. The PSM guidebook defines the Product Support Strategy (PSS) as the overarching approach to meet sustainment requirements. The DoD conducts detailed planning and design reviews such as the Preliminary Design Review (PDR), Critical Design Reviews (CDR), System Verification Review, Functional Configuration Audit, Production Readiness Review, and the Physical Configuration Audit (PCA) to assess system functionality to meet the goals of the PSS. The following paragraphs detail the management, surveillance, and control activities necessary to carryout PSA.

5.5.1 General Considerations.

During the PSA effort, general considerations of management, surveillance, and control are required.

5.5.2 Activity A.1, Product Support Strategy (PSS).

This activity is a program's overarching approach to meet sustainment requirements. Product support planning and PSS development begins prior to program initiation, and the resultant method of executing product support (i.e., the product support solution) is re-evaluated and updated throughout the program's life cycle. (DoDI 5000.91). The PSS is closely related to, but not synonymous with, a program's LCSP. The LCSP is the primary program management reference governing operations and support planning and execution from

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program inception to disposal and establishes the system's product support planning and sustainment approach. The PSS is embodied within the LCSP.

The LCSP and PSS satisfy the statutory requirement of Section 4324 of Title 10, U.S.C., and the regulatory requirement in Paragraph 3D.2.b.(1)(c) of this appendix. The PM, with the support of the PSM, will develop and implement an effective performance-based life cycle PSS that will deliver an integrated and affordable product support solution designed to optimize system readiness for the warfighter. (DoDI 5000.91) PMs for all programs are responsible for developing and maintaining a PSS to document the support package, beginning at the Development RFP Release Decision Point and throughout the program life cycle. The PSS outlines the execution of the support package and describes sustainment requirements in system design and the technical, business, and management activities to develop, implement, and deliver a support package that achieves effective and affordable operational materiel readiness outcomes. The acquisition strategy also includes an overview of the PSS and sustainment-related contracts.

The PSM IPS element includes developing and implementing a PSS to ensure supportability is considered throughout the system life cycle.

This activity is the earliest planning activity for a PSA program and is the key first step in achieving cost-effective outcomes. Analyzing probable design and operational approaches, supportability characteristics, and available data before finalizing activity requirements ensures that the PSA program is focused on the key areas which provide maximum supportability impact on design. The small investment in this activity is essential to ensure a good return on future investments. While most relevant to developing a strategy for concept exploration, this activity is generally applicable prior to preparation of any solicitation document containing PSA activity requirements. The PSM Guidebook states that "PMs pursue two primary support objectives. First, the weapon systems be designed to affordably deliver the required warfighting capability. Second, the product support solution is efficient and effective, and it reduces the demand for product support while meeting Warfighter requirements. When developing and implementing a PSS, which is defined as the overarching approach to meet sustainment requirements, the goal of the PSS is to balance and integrate the support activities necessary to meet these two objectives."

5.5.2.1 Overview.

This strategy identifies the contractor's approach and description of how the PSA will be conducted to meet program requirements as part of the system engineering process. The PSS is used to establish and execute an effective PSA program. When submitted as a response to a solicitation document, it is used in the source selection process.

5.5.2.1.1 Purpose.

To develop a proposed PSS for use early in the acquisition program; and identify the PSA activities which will provide the best return on investment and document the risks of accomplishing these objectives.

5.5.2.1.2 Required for.

The PSS interrelates with the Acquisition Strategy (AS) and is included in the LCSP. It should be available prior to preparation of any solicitation document containing PSA activity requirements and should be used as a guide in developing such documents. Failure to complete this activity may result in a strategy and plan that fails to establish a successful PSA program.

5.5.2.1.3 When Required.

Initial PSS development begins in the Materiel Solution Analysis (MSA) phase concurrent with the development of the Acquisition Strategy. The LCSP and PSS are updated throughout the life cycle. Required updates should be completed and available prior to initiation of the next program phase.

5.5.2.1.4 Applicable LPD Summaries.

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None.

5.5.2.1.5 Associated Standards.

SAE TA-STD-0017A.

5.5.2.1.6 Associated Products.

SEP, LORA program, SOW development, Work Breakdown Structure, and PSA Candidate List.

5.5.2.1.7 Responsibility.

The government is responsible for performing management of the PSA program in all phases. Depending on the programs Acquisition Strategy and contractual requirements, the contractor provides a recommended support solution respective of the system design requirements.

5.5.2.1.8 LPD Documentation.

None.

5.5.2.2 Activity A.1.1, Develop Supportability Objectives.

Supportability design objectives form boundary conditions or goals for both engineering performance and IPS element concepts and plans and affect design and operational concepts; identify gross product support resource requirements of alternative concepts; and relate design, operational, and supportability characteristics to system readiness objectives and goals.

For the purposes of the PSA process, primary supportability design objectives include:

a. Logistics Infrastructure
b. Logistics Footprint
c. Architecture
d. Reliability
e. Maintainability
f. Logistics Technologies

5.5.2.3 Activity A.1.2, Identification and Measurement of Cost Drivers.

A cost driver is any factor activity that triggers a change in the cost of another activity. An example of this could be how the amount of electricity a factory uses in a month determines the price of the electricity bill. The units of electrical power are the cost drivers, and the electricity bill is the cost.

The number of hours that a company's employees work is one of the most common types of cost drivers. This determines the wages that the company pays its employees. It also directly correlates with the amount of production that takes place during those assigned work hours.

5.5.2.4 Activity A.1.3, Update the Product Support Strategy.

The LCSP should be updated at each milestone and at specified decision points throughout the program life cycle for all IPS elements. LCSP updates requiring CAE approval should reflect the increased maturity of the support package, current risks, and any cost reduction activities. Additional decision points include planned and then implemented major modifications to the system and when there are changes to the support package including current risks and cost reduction activities.

5.5.2.5 Additional Information.

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The paragraphs below contain useful information regarding this activity and sub-activities.

5.5.2.5.1 The Systems Engineering Plan (SEP).

SEP is an acquisition program's primary technical planning document to assist PMs in developing, communicating, and managing the overall systems engineering (SE) approach and guides all technical activities of the program. The SEP identifies organizations that are integral to the acquisition of a program, and documents key technical risks, processes, resources, metrics, systems engineering (SE) products, design considerations, and completed and scheduled SE activities. The SEP references the PSA strategy and planning process.

5.5.2.5.2 Program Management.

Good management of the PSA effort requires (1) planning which identifies all the required actions, (2) scheduling which identifies the timing of each required action and who is responsible for each action, and (3) execution through timely management decisions. Management procedures should be established to ensure that the right information is available at the right time so that timely decisions can be made. PSA planning and management should always be performed by the requiring authority.

5.5.2.5.3 Identifying Analysis Task Requirements.

The determination of which PSA Activity should be performed for a given acquisition program and life cycle phase is documented in Tables III-XXXII.

5.5.2.5.4 Timing.

Scheduling the accomplishment of an activity (i.e., LORA is completed, FMECA is updated, etc.) is critical for the PSA program to achieve its objectives. Scheduling and managing activity accomplishments can be significantly aided by employing critical path networking techniques. The criteria that should be applied for proper scheduling of PSA actions is to ensure that (1) all required actions are completed and results are available when needed, and (2) only the required actions are done and only the required data is available to prevent wasting resources and time. Factors to consider when scheduling PSA activities include the following:

a. During the early phases of the acquisition life cycle, most PSA activities should be completed, the remaining activities should be drafted, and supportability information available when alternatives are being considered to achieve design influence. Later in the acquisition process, PSA activities should be completed and supportability information available to ensure that the IPS elements are identified, tested, and fielded on a timely basis.

b. When comparing alternatives, do not analyze below the level necessary to evaluate differences. Lower-level analyses can be conducted after an alternative is selected.

c. Occasionally, it may be too late in the acquisition program’s life cycle to conduct certain PSA activities. For instance, once the design is finalized, design-oriented trade-offs yield minimal or no return on investment.

5.5.2.5.5 Program Execution.

A successful PSA effort requires that the identified activities be conducted as planned. This is achieved through continued monitoring of the effort to identify problems as they occur and having an established mechanism to make management decisions that eliminate or minimize problems as they occur. Efficient program execution requires that working arrangements between the PSA program and other system engineering processes be established to identify mutual interests, maximize the benefits of mutually supporting activities, and minimize effort overlap.

5.5.2.5.6 LCSP Content Requirements.

The content of the LCSP is dependent upon each program’s unique requirement.

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The rationale used in making the below recommendations can include the following as appropriate:

a. Potential design impacts from performing PSA activities.

b. Cost effectiveness of each activity.

c. Availability of data required to perform the activity.

d. Estimates of reliability and maintainability, and evaluation of the supportability/affordable readiness trade space, with consideration of operating and support costs, product support resource requirements, and readiness characteristics of potential design and operational approaches for the new product.

The following, while not all inclusive, is a list of recommended items that the government may wish to include.

a. Identification of the product, procuring activity, preparing activity, and contract number.

b. Proposed supportability objectives for the new system.

c. Estimated cost to perform the proposed PSA activities.

d. Identification of proposed organizations to perform the recommended PSA activities.

5.5.3 Activity A.2, Product Support Analysis Planning.

The PSAP is the basic tool for establishing and executing an effective PSA program. The PSAP may be a standalone document, a Component-required annex to the LCSP, or included as part of the program's SEP/Systems Engineering Management Plan (SEMP). A Product Support Plan outlines the execution of the support package and describes sustainment requirements in system design and product support implementation. It includes strategies, processes, and procedures for delivering support services. Plans submitted in response to solicitation documents assist the requiring authority in evaluating the prospective performing activity's approach to, and understanding of the PSA activity requirements, and the organizational structure for performing PSA activities.

5.5.3.1 Overview.

The PSAP documents the PSA program, which includes management, authority, activities, responsibility, integration, and results.

5.5.3.1.1 Purpose.

To develop a PSAP which will effectively implement the PSA program. It also documents the PSA management structure and authority; what PSA activities are to be accomplished; when each activity will be accomplished; what organizational units will be responsible for accomplishing each activity; how all activities are integrated; and how results of each activity will be used.

5.5.3.1.2 Required for.

The PSAP is a basic tool for executing an effective PSA program to meet the system and product support requirements. When it is submitted as part of the response to a solicitation document, it is used in the source selection process. Failure to accomplish this activity may result in the inability to determine if the level of effort proposed is consistent with the strategy and cost constraints as well as impacting the development and implementation of the LCSP.

5.5.3.1.3 When Required.

The PSAP is prepared in the Materiel Solution Analysis (MSA) phase and updated iteratively in all subsequent phases.

5.5.3.1.4 Applicable LPD Summaries.

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None.

5.5.3.1.5 Associated Standards.

SAE TA-STD-0017A. DoDI 5000.91 DI-PSSS-82218A.

5.5.3.1.6 Associated Products.

PSAP updates, program schedule changes, test results, PSA activity results, program status, planned actions, and updated procedures.

5.5.3.1.7 Responsibility.

During MSA, the government is responsible for initial preparation of the PSAP. The contractor updates the PSAP prior to the P&D phase and during subsequent phases.

5.5.3.1.8 LPD Documentation.

None.

5.5.3.2 Activity A.2.1, Product Support Analysis Plan.

When requiring a PSAP, the requiring authority should allow the performing activity to propose additional activities or activity modifications, with supporting rationale that illustrate overall program benefits, to those activities contained in the solicitation document. The PSAP, when approved by the requiring authority, becomes a part of the SOW.

5.5.3.3 Activity A.2.2, Plan Update.

The PSAP should be a dynamic document that reflects current program status and planned actions. Accordingly, procedures should be established for updates and approval of updates by the requiring authority when conditions warrant. Program schedule changes, test results, or PSA activity results may dictate a change in the PSAP so that it may be used effectively as a management document. Data availability, accuracy and relevance improve as program development progresses. Supportability objectives and planned analysis activities/sub-activities are updated as data validity improves. The initial supportability analysis plan is defined before Milestone A. The supportability analysis plan is refined and updated prior to Milestone B to reflect program changes, modifications to schedules, resources and funding availability.

5.5.3.3.1 Additional Information.

The paragraph below contains useful information regarding this activity and sub-activities.

5.5.3.3.2 PSAP content requirements.

The content of the PSAP is dependent upon each program’s unique requirement. The PSAP identifies and integrates all PSA activities, identifies management responsibilities and outlines the approach for accomplishing analysis activities. This data is used to evaluate the contractor's ability to meet the program's product support requirements. The following, while not all inclusive, is a list of recommended items that the government may wish to include:

5.5.3.3.3 Description of a PSA Program:

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a. An identification of the new product, procuring activity, preparing activity, and contract number.

b. A description of how the PSA program will be conducted to meet the system and product support requirements contained in the applicable program documentation.

c. An identification of the management structure and authorities applicable to PSA. This includes the interrelationships between line, service, staff, and policy organizations.

5.5.3.3.4 Identification of Each PSA Activity:

a. An identification of each of the Activities that will be accomplished and how each will be performed.

b. An identification of the major tradeoffs to be performed.

c. Create a PSA program schedule.

d. Delivery of supportability data and documentation, i.e., SAE GEIA-STD-0007 XML data.

e. A description of how PSA activities and data will interface with other product support and product-oriented activities and data.

5.5.3.3.5 PSA Activities:

a. The Work Breakdown Structure (WBS) identification of items for which PSA will be performed and documented. (for more information on WBS refer to MIL-STD-881 for Defense Materiel Items).

b. A PSA Candidate List (National Stock Number (NSN), Item Name, Contractor and Government Entity (CAGE) and part number) and applicable selection criteria. The list should include all items recommended for selection or non-selection.

c. The method by which supportability and supportability related design requirements are disseminated to designers, associated personnel, and subcontractors. In the case of subcontractors, identify the controls levied under such circumstances.

d. An identification of Government Furnished Information (GFI).

e. A description of design review procedures which provide official review and control of released design information to include PSA program participation.

f. Identification of applicable system intellectual property and data rights.

5.5.3.3.6 LPD Validation:

a. A description of the data collection system to be used by the performing activity to document, disseminate and control the PSA and related design data.

b. The PSA and LPD requirements on Government Furnished Equipment (GFE)/materiel and subcontractors/vendor furnished materiel including end times of support equipment.

c. The procedures (where applicable) to evaluate the status and control of each activity, and identification of the organizational unit with the authority and responsibility for executing each activity.

d. The procedures, methods, and controls for identifying and recording design problems or deficiencies affecting supportability, corrective actions required, and the status of action taken to resolve the problems.

5.5.4 Activity A.3, Program and Design Reviews.

This activity is directed toward four types of reviews: (1) review of design information released by the performing activity from a supportability standpoint, (2) system/equipment design reviews, (3) formal system/equipment program reviews, and (4) detailed PSA program reviews. These system/equipment reviews, to include provisioning conferences, should be scheduled in a manner that supports integrated engineering principles and support concepts. The review of design information released by the performing activity from a supportability standpoint provides supportability specialists the authority with which to manage design

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influence and tradeoffs. For most developers these types of reviews are routine events and would not impose any additional cost. These reviews are applicable during design and design modification efforts and, therefore, should not be applied to non-developmental acquisition programs.

5.5.4.1 Overview.

This activity establishes a requirement for the contractor to plan and provide for official review and control of released design information with PSA program participation. This ensures that the PSA program is proceeding in accordance with the contractual milestones in order for supportability and supportability related design requirements to be achieved in a timely and controlled manner. PSMs or supportability managers should work with Systems Engineering to conduct design reviews or data reviews.

5.5.4.1.1 Purpose.

To provide for timely PSA program participation in the official review and control of design information; the scheduling of detailed PSA program reviews; and product support risk assessments at program reviews. It also ensures that pertinent aspects of the PSA program are addressed as an integral part of all formal program/design reviews and proceeding in accordance with the contractual milestones. This ensures that the supportability and supportability related design requirements will be achieved.

5.5.4.1.2 Required for.

Design reviews identify and discuss all aspects of the PSA Program and provide product support specialists a mechanism for accomplishing design influence and tradeoffs. PSA program reviews include but are not limited to IPS management team meetings, reliability program reviews, integration reviews, PSA guidance conferences, and provisioning reviews. These reviews aid in monitoring the overall progress, quality, and consistency of the PSA effort. Failure to accomplish this activity may needlessly increase the risk to project development.

5.5.4.1.3 When Required.

Program and design reviews are generally initiated during the MSA phase and scheduled periodically throughout subsequent life cycle phases.

5.5.4.1.4 Applicable LPD Summaries.

None.

5.5.4.1.5 Associated Standards.

SAE TA-STD-0017A, IEEE 15288.2, and SAE EIA-649.

5.5.4.1.6 Associated Products.

Schedule.

5.5.4.1.7 Responsibility.

The government is responsible for this activity during MSA. The contractor assumes responsibility for conducting the reviews during Technical Maturation and Risk Reduction (TMRR) phase and subsequent life cycle phases.

5.5.4.1.8 LPD Documentation.

None.

5.5.4.2 Activity A.3.1, Design Review Procedures.

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This activity provides Logistics Engineers (LE) and PSMs with guidance to manage design influence and tradeoffs. For most developers this type of review is a routine event and performance of this activity would not impose any additional cost. This activity is primarily applicable during design and design modification efforts but may be used when performing a non-developmental acquisition program. Contractor procedures for this type of review would be included in the PSAP. Document design review procedures (where procedures do not already exist) provide for official review and control of released design information with LSA program participation in a timely and controlled manner. These procedures should define accept/reject criteria pertaining to supportability requirements, the method of documenting reviews, the types of design documentation subject to review, and the degree of authority of each reviewing activity.

5.5.4.3 Activity A.3.2, Design Reviews.

Reviews such as preliminary design reviews (PDR), critical design reviews (CDR), and production readiness reviews (PRR) are an important management and technical tool of the requiring authority. These should be specified in Statements of Work (SOW) to ensure sufficient staffing and funding and are typically scheduled during an acquisition program to evaluate overall program progress, consistency, and technical adequacy. An overall PSA program status should be an integral part of these reviews whether conducted internally, with subcontractors, or with the requiring authority. The results of performing activity's internal and subcontractor reviews should be documented and made available to the requiring authority upon request. During design reviews, each product should be formally reviewed and assessed for supportability and supportability-related design contract requirements. Reviews should be scheduled, and all interested parties informed in advance of each review. Results of each product design review should be documented. Design reviews should identify and discuss all pertinent aspects of the PSA program. Typical design review topics may include:

a. PSA conducted by activity and engineering breakdown element.

b. A supportability assessment of the proposed design features including supportability, cost, and readiness drivers and new or critical product support resource requirements.

c. Corrective actions considered, proposed, or taken.

d. Progress toward establishing or achieving supportability goals.

e. PSA documentation status.

f. Design, schedule, or analysis problems affecting the ability to meet supportability goals.

g. Identification of supportability-related design recommendations to include a description of the recommendation, whether it has been approved or remains pending, and the rationale for approval (e.g., cost savings, maintenance burden reductions, supply support reductions, reliability improvements, safety or health hazard reduction, and environmental risks).

h. How the design meets the requirements of all Key Performance Parameters (KPPs).

i. Other topics and issues as appropriate.

5.5.4.4 Activity A.3.3, Program Reviews.

The Acquisition Program utilizes program reviews to evaluate overall program progress, status, consistency, and technical adequacy. These should be specified in the SOW to ensure sufficient staffing and funding and are typically scheduled periodically during an acquisition program. An overall PSA program status should be an integral part of these reviews whether conducted internally, with subcontractors, or with the requiring authority. The results of performing activity's internal and subcontractor reviews should be documented and made available to the requiring authority upon request. Formal review and assessment of supportability and supportability-related design contract requirements should be an integral part of each product program review specified by the contract. Program reviews include Product Support management team meetings and the following reviews: reliability program, maintainability program, technical data, test integration, training program, HSI program, system safety program, supply support, and other internal and external program reviews. Agendas should be developed and coordinated to address, at a minimum, the topics listed under Activity A.3.2 as they apply to the activity phase and the review being conducted.

5.5.4.5 Activity A.3.4, Technical Interchange Meetings (TIM).

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In addition to system/equipment program and design reviews, specific reviews of the PSA program should be periodically conducted (Activity A.3.4), include events such as PSA TIMs, PSA guidance conferences, LORA guidance conferences, and provisioning conferences. These reviews should provide a more detailed coverage of items addressed at program and design reviews and should address progress on all PSA activities specified in the SOW. Representative discussion items include activity results, data, status of assigned actions, design and supportability problems, test schedule and progress, and the status of subcontractors' and suppliers' efforts. PSA reviews should be conducted as part of the system reviews when possible and should be specified and scheduled in the SOW for Activity A.3. An integral part of this review process includes conducting a detailed guidance conference as soon as possible after contract award to ensure a thorough and consistent understanding of the PSA requirements between the requiring authority and performing activity. Additionally, the requiring authority should establish review policies which maximize the resources available for review. Review of draft LPD reports contained in SAE TA-HB-0007-1A compared to sampling of PSA data, scheduling reviews as required rather than on a fixed schedule basis and concentrating on drivers and high-risk areas are some of the considerations that should be addressed in establishing the review policies. The PSA program should be planned and scheduled to permit the contractor and the customer to review program status.

5.5.4.5.1 Additional Information.

The paragraph below contains useful information regarding this activity and sub-activities.

5.5.4.5.2 Data Accession List.

In addition to formal reviews, useful information can often be gained from performing activity data, which is not submitted formally, but which can be made available through an accession list. This list is a compilation of documents and data which the requiring authority can order or be reviewed at the performing activity's facility. Typically, the details of design analyses, test planning, test results, and technical decisions are included. These data elements constitute a source of information not otherwise available.

5.5.5 Activity A.4, Integrated Data Environment for Product Support (IDE-PS).

This activity merges the separate data environments of production, support, and customer stakeholders into one environment. This data environment allows for the transfer/transformation/interfacing procedures to be executed from a central location. Two specific actions of this environment allow for a collaborative environment for data exchanges and file sharing between stakeholders and electronic data exchange to transform specific transactions between stakeholders. These transactions can include government to government, contractor to government, and contractor to contractor interactions. The IDE-PS is a container for Digital Product Support, which implements product support activities related to Model-Based System Engineering (MBSE). This allows for the implementation of digital thread technology which should include artificial intelligence (AI) that will create the most cost-effective support package.

5.5.5.1 Overview.

The goal of Activity A.4 is to allow for a seamless collaborative environment for data transfer and exchanges between stakeholders and other enterprise resource systems.

5.5.5.1.1 Purpose.

To create a single data collaborative environment (e.g., models, drawings, engineering, LPD, tech manuals, etc.) which allows for data transfer through an electronic data exchange to other trading partners and enterprise resource systems.

5.5.5.1.2 Required for.

All systems which utilize a collaborative environment for data exchanges for their production, support, and stakeholders.

5.5.5.1.3 When Required.

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Activity should be initiated and planned for early in the acquisition life cycle. Initial requirement for the IDE-PS should be initiated by the Government in the MSA phase with the contractor setting up the interfaces in the TMRR phase of the acquisition.

5.5.5.1.4 Applicable LPD Summaries.

None.

5.5.5.1.5 Associated Standards.

SAE TA-STD-0017A, Army Directive 2024-03.

5.5.5.1.6 Associated Products.

Include, but not limited to, Acquisition Strategy (AS), ILS SOW, LCSP, Test and Evaluation Master Plan (TEMP), Data Collection and Analysis Plan, SEP, Digital Engineering Implementation Plan; and IDE-PS specific: Processes and Procedures, Gap Analysis Plan, Software Integration Plan, Interface Control Documents (ICD), and Performance Reports.

5.5.5.1.7 Responsibility.

The government is responsible for performing this activity to provide early management of the IDE-PS during the MSA phase. Typically, the contractor assumes the development and update of the IDE-PS during the TMRR phase and retains it through P&D, while the government retains overall responsibility throughout the program life cycle.

5.5.5.1.8 LPD Documentation.

None.

5.5.5.2 Activity A.4.1, Examine Stakeholder Information Environments.

The program stakeholders should understand data requirements, identify gaps, and implement an effective IDE-PS. These gaps should focus on items such as the transfer of data in a common format (for instance, SAE GEIA-STD-0007), the integration of electronic data exchange for the overall engineering effort. Creating a process for examining stakeholder information environments is often similar to the process for a stakeholder analysis. Stakeholder analysis is a project management tool that serves to identify the project's stakeholders, their interests, and how they will be impacted as well as identifying the project's gaps, or areas of concern and how they will be impacted by the project or program. It is normally conducted at the beginning of a project to better understand the need of each stakeholder and their primary requirements. Examining stakeholder information environments for a project can be done by the following:

a. Identify stakeholders: Stakeholders may be affected by or influence the project. Identifying the level of influence and interest of each stakeholder is the best way to involve them on the project.

b. Understand stakeholder needs: This will help to tailor communication and engagement strategies to meet the needs of stakeholders.

c. Keep stakeholders informed and engaged: Informing stakeholders about the project's progress and any changes that may affect them helps build trust and maintain positive relationships. Engaging stakeholders in the project and providing opportunities for feedback helps ensure that needs of all stakeholders are addressed.

5.5.5.3 Activity A.4.2, Create the Integrated Data Environment for Product Support.

Once all requirements have been identified and gaps addressed, an effective IDE-PS should be created. This includes the data transfer, interoperability between systems, and all the procedures and processes needed to manage and operate the system.

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5.5.5.4 Activity A.4.3, Update the Integrated Data Environment for Product Support.

The IDE-PS should be updated, adjusted, and reevaluated throughout the life of the system.

5.5.5.5 Activity A.4.4, DevSecOps.

In response to increasing threats, software systems acquisitions are required to better integrate security practices during the development phases of the life cycle. This practice of tightly integrating development, security, and operations is called DevSecOps and is used throughout all levels and types of software acquisition and supported by the IDE-PS process.

5.5.5.6 Activity A.4.5, Digital Thread.

The digital thread is a powerful framework to harmoniously connect, access, and transform disparate data into usable information. The PSM Guidebook highlights the use of a Digital Engineering Implementation Plan which complements the use of the digital thread in system acquisitions.

5.5.5.6.1 Digital Engineering.

Emerging Digital Engineering (DE) technology is changing how logistical processes are performed. DE uses models which clearly communicate requirements, design, analysis implementation, and verification of a capability, system, and product throughout the acquisition life cycle. These processes are migrating from document-based solutions (with 2D drawings which are only human readable) to digital models (which are 3D models readable by humans, as well as machines) that allow for dynamic engineering changes which are tailored for the system throughout the product life cycle.

5.5.5.6.2 Model-Based Engineering.

The traditional acquisition process is based on a design-prototype-test-build methodology: systems begin with documented requirements and progress through the acquisition life cycle. A Model-Based Engineering (MBE) approach employs a design-model-simulate-optimize methodology: systems progress from a prototype (mathematical, digital, and/or physical model) to a final build or multiple builds throughout the acquisition life cycle. Modeling allows changes in requirements or designs to be represented and simulated before building physical components, which promotes efficiencies in system cost, schedule, and performance. In addition, the model acts as a single authoritative source of information which can be accessed by the appropriate stakeholders.

5.5.5.6.3 Model-Based System Engineering.

Model-Based System Engineering (MBSE) is a formalized process of modeling applied to requirements, design, analysis, verification, validation, integration, and certification activities, beginning early in the design and continuing through its life cycle. Authorized stakeholders from various disciplines can access and share integrated architecture products such as system views, use cases, and data elements. Programs can use MBSE to trace requirements, create information structures, model data flows, and promote interoperability to support the system life cycle management process.

5.5.5.6.4 Digital System Model.

As model-based infrastructures become more widely adopted, data which was segregated or compartmentalized can be shared among various stakeholders in the manufacturing and product life cycle. The digitization and traceability throughout the product life cycle can be found in its digital thread, which is a communication framework that connects system data across functional perspectives. SAE TA-STD-0017A defines the digital thread as “an extensible, configurable, or component enterprise-level analytical framework that seamlessly expedites the controlled interplay of authoritative technical data, software, information, and knowledge in the enterprise data, information and knowledge systems, based on the Digital System Model template, to inform decision makers throughout a system’s life cycle by providing the capability to access, integrate, and transform disparate data into actionable information.”

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The Digital System Model is a digital representation of a DoD system, generated by all stakeholders, that integrates the authoritative technical data and associated artifacts which define all aspects of the system for the specific activities throughout the system life cycle. (Office of the Deputy Assistant Secretary of Defense)

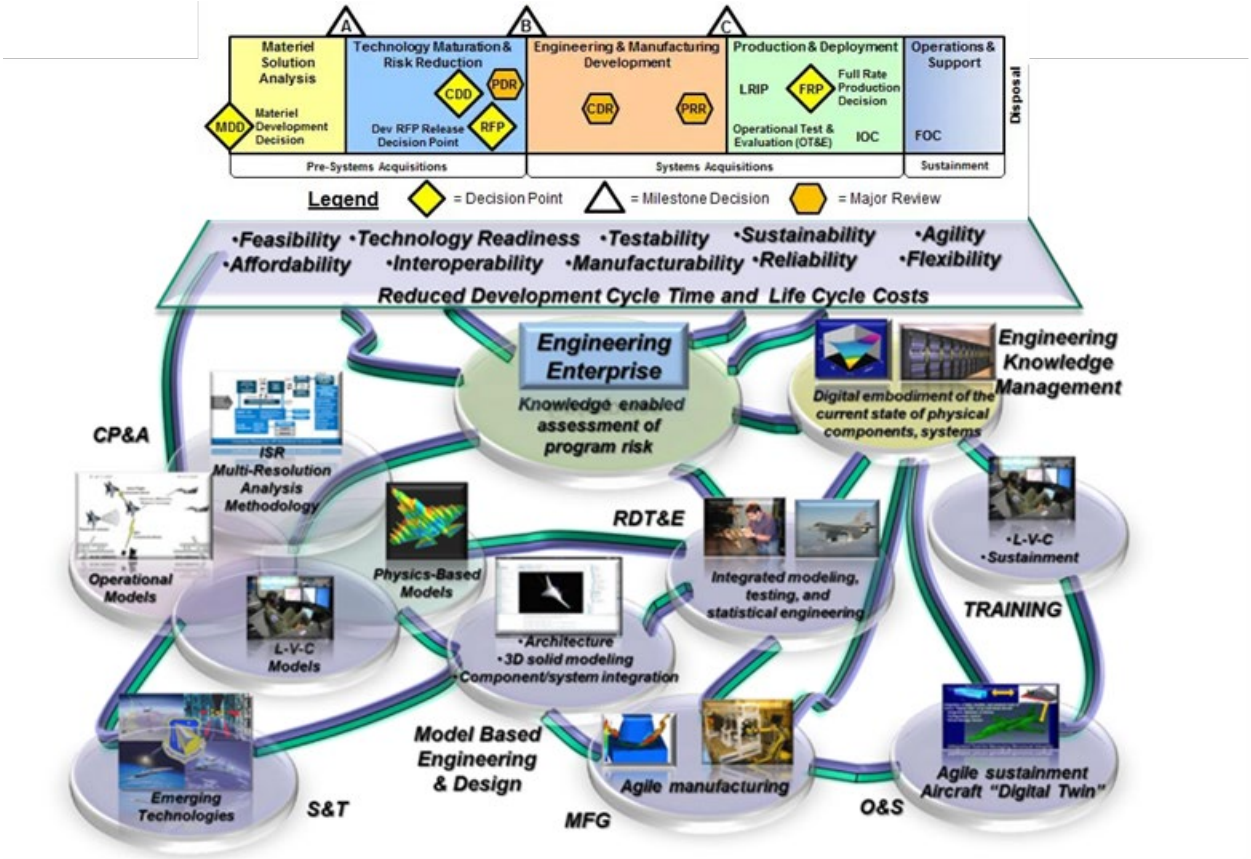


FIGURE 5. Digital Thread - OV-1

5.5.5.6.5 Digital Twin.

As programs build and advance digital thread technology, a digital twin, may be created, which is a highly complex virtual model that accurately replicates a physical object. As it matures, the digital twin may become an exact counterpart (or twin) of a physical object or process. This pairing of the virtual and physical worlds allows analysis of data and monitoring of systems to anticipate problems before they occur, prevent downtime, develop new opportunities, and use simulations to plan for maintenance, training, and sustainment. Digital twins can be applied in an acquisition program to improve conceptual development, research and development, testing, data collection, predictive maintenance, and product improvement. Engineers and logisticians can use digital twin technology early in the acquisition life cycle to make informed decisions regarding supportability objectives of the program. Sensor data can be collected and used in simulations to aid in predictive maintenance decisions. The digital twin serves as an enduring source of information for decision makers and other stakeholders.

5.5.5.6.6 Digital Product Support.

Digital Product Support is based on an Authoritative Source of Truth (ASoT) Model. The authoritative data source utilizes a central repository of product data and models which enables data-based decision making by product support stakeholders to plan and predict maintenance activities, optimize sparing levels, and reduce

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supply chain delays throughout the product life cycle. This comprehensive and cohesive model-based approach for product support augments legacy document-based program management approach. The model-based enterprise can use Digital Engineering capabilities, including the Digital Thread and Digital Twin, to develop requirements, verify and validate product designs, identify and reduce risk, predict life cycle cost, implement service life extension programs, and document all relevant activities in the authoritative data source.

5.5.5.6.7 The DoD Enterprise DevSecOps Strategy Guide.

This guide defines DevSecOps as a software life cycle approach which creates cross-functional teams that unify historically disparate evolutions, development (Dev), cybersecurity (Sec), and operations (Ops). As a unified team they follow Agile principles and embrace a culture that recognizes resilient software is only possible at the intersection of quality, stability, and security as shown in the DEVSECOPS (see FIGURE 6).

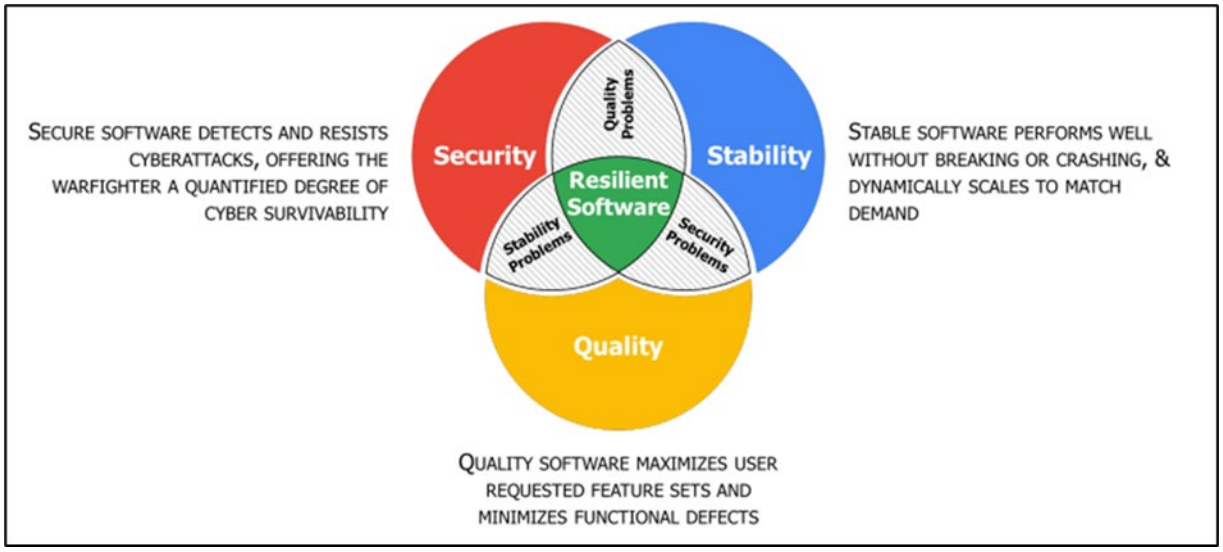


FIGURE 6. DEVSECOPS

The use of DEVSECOPS in the PSA process is included in SAE TA-STD-0017A, Activity A.4.4 – DevSecOps. The identification of software development practices to include security approaches should begin early in the life cycle in the MSA phase and be included in the Product Support Strategy.

The benefits of adopting DevSecOps include:

a. Reduced risk of security vulnerabilities: By integrating security into the Software Development Life Cycle, DevSecOps can help to reduce the risk of security vulnerabilities being introduced into products. This can help to protect customers from cyberattacks and data breaches.

b. Improved customer satisfaction: By resolving security issues quickly and efficiently, DevSecOps can help to improve customer satisfaction. This can lead to increased customer loyalty and repeat business.

c. Reduced operational costs: By automating the security testing process, DevSecOps can help to reduce operational costs. This can result in reallocation of resources for other purposes, such as developing new products or improving customer service.

d. Incident Response: DevSecOps teams need to establish effective incident response processes to quickly identify and respond to security incidents or vulnerabilities reported by customers or detected through monitoring systems. This involves investigating the root cause of the issue, assessing its impact, and taking appropriate remedial actions. DevSecOps teams should work closely with customer support teams to address security-related inquiries, concerns, or issues raised by customers. This

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collaboration ensures that customer support personnel have the necessary knowledge and resources to provide timely and accurate assistance to customers regarding security matters.

e. Monitoring and Logging: Continuous monitoring and logging of the software product in production environments are crucial for detecting security incidents and performance issues. DevSecOps teams should implement robust monitoring solutions that provide visibility into the product's behavior, security events, and system logs. These insights help identify potential security gaps, investigate incidents, and make informed decisions for improvement.

f. Feedback Loop: DevSecOps emphasizes continuous improvement, and product support analysis plays a vital role in gathering feedback from customers and support teams. This feedback should be used to identify patterns, recurring issues, or potential areas of improvement. The DevSecOps team can then prioritize and address these issues in subsequent development and deployment cycles.

g. Security Training and Knowledge Sharing: DevSecOps teams should invest in training and knowledge sharing initiatives to enhance the security expertise of all team members. This helps ensure that the team has the necessary skills to analyze and respond to security-related support requests effectively.

5.6 Activity Group B, Supportability Objectives.

It is essential to conduct PSA early in an acquisition program to identify constraints, thresholds, and targets for improvement, and to provide supportability input into early tradeoffs. It is during the early phases of an acquisition program that the greatest opportunity exists to influence design from a supportability standpoint. These analyses can identify supportability parameters for the new system/equipment which are reasonably attainable, along with the prime drivers of supportability, cost, and readiness. The drivers, once identified, provide a basis for concentrated analysis effort to identify targets and methods of improvement. Mission and support systems definition activities are generally conducted at system and subsystem levels early in the system acquisition process (JCIDS Process, MSA phase). These activities present ample opportunities for the logistician to influence supportability aspects in the design when being executed early in the life cycle.

5.6.1 General Considerations.

Identification and analysis of risks play a key role due to the high level of uncertainty early in the life cycle. Performance of these activities requires examination of current operational systems and their characteristics, as well as projected systems and capabilities that will be available in the time frame that the new system/equipment will reach its operational environment. New system/equipment supportability and supportability related design constraints should be established based upon support systems and resources that will be available when the new system/equipment is fielded. These may be less than, equal to, or greater than the corresponding capabilities for current systems.

5.6.2 Activity B.1, Application and Usage Assessment.

The Application and Usage Assessment, which is commonly referred to as the “use study”, is the prerequisite analysis activity to all other activities in a PSA program. It should be done in conjunction with the JCIDS process to provide the basis for all IPS planning and readiness analyses for the new system/equipment. The operational concept specifies how the new system/equipment will be integrated into the force structure, deployed, and operated in peacetime/wartime to satisfy the mission need (Activity B.1.1). This concept provides the framework around which the support system should be developed. The use study establishes the quantitative supportability factors (Activity B.1.2) required for readiness and IPS resource projections. Due to the significant impact of the operational concept on readiness analyses and IPS planning, the Application and Usage Assessment should look at both the most probable and worst-case scenarios for peacetime/wartime operation of the new system/equipment. Field Visits (Activity B.1.3) to operational units and depots can provide significant input into the application assessment in terms of identifying existing capabilities, resources, and problems. Field visits can be useful once the operational environment for the new system/equipment is identified in sufficient detail to determine existing operational units and depots that would most likely be involved in the operations and support of the new system/equipment. For more information refer to the Guide for Performance Specifications, SD-15, which provides guidance on performance specifications, focusing primarily on stating requirements in performance terms and ensuring that sufficient verification means are included in the specification to evaluate conformance.

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5.6.2.1 Overview.

The goal of Activity B.1 is to identify and document the supportability factors related to the application of the new product/system.

5.6.2.1.1 Purpose.

To identify support factors related to the system's intended use. Also, to document quantitative data which should be considered when developing support alternatives.

5.6.2.1.2 Required for.

Quantitative support factors (i.e., operating requirements, Operational Availability (A_o), transportation modes/times, allowable maintenance periods, and environmental requirements which include hazardous materials, hazardous waste, and other pollutants) identified by the assessment are incorporated in the Capability Development Document (CDD). Legacy Capability Production Documents (CPDs) remain valid and will be accepted to support the development of solutions to capability gaps. Failure to accomplish this activity could result in an ICD/CDD that does not define the system support objectives of the new product/system.

5.6.2.1.3 When Required.

The Application and Usage Assessment is a prerequisite to all other analysis activity; therefore, it should be initiated in the MSA phase. Updates of the assessment are applicable in the TMRR phase and continue through the EMD phase. Once planned operational and support environments of the new system are identified, visits to existing units and depots which simulate those environments can provide significant input into assessment updates.

5.6.2.1.4 Applicable LPD Summaries.

LSA-023 and LSA-085.

5.6.2.1.5 Associated Standards.

SAE TA-STD-0017A.

5.6.2.1.6 Associated Products.

LCSP, SEP, CDD, KPP, Key System Attribute (KSA).

5.6.2.1.7 Responsibility.

Activity B.1 is the responsibility of the government through the TMRR phase. The contractor is responsible for performing the update during EMD and the government retains overall responsibility.

5.6.2.1.8 LPD Documentation.

Entities impacted are Operations and Maintenance (A Entities), Transportability Requirements (J Entities), and Cross Functional Requirements (X Entities).

5.6.2.2 Activity B.1.1, Intended Use/Capabilities.

When introducing a new product, typically using the ICD and Capability-Based Assessment (CBA) as inputs, identify and document the key supportability factors that impact its application. Consider the following factors, among others: mobility requirements, application scenarios, task frequency and duration, basing concepts, anticipated service life, interoperability, operational environment, human capabilities and limitations, planned usage and employment, preplanned product improvement. Additionally, review and document any previous

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analyses that have quantified interoperability with similar products, to inform the supportability assessment of the new product.

5.6.2.3 Activity B.1.2, Quantitative Factors.

For each factor, develop quantitative data, supported by operationally oriented analyses, which considers technological maturity, fiscal constraints, and timeframe requirements. Establish a threshold value and an objective value for risks in cost, schedule, and technology. Consider best, most probable, and worst operating scenarios. Factors to be considered include, but are not limited to, task frequency, task duration, transportability, application scenarios, service life analysis, interoperability, operational environments, environmental conditions, manpower, planned usage, product improvement, number of systems, and maintenance periods.

5.6.2.4 Activity B.1.3, Field Visits.

Conduct field visits to those operational and support activities of existing products that most closely represent the planned O&S environment for the new product. Types of analyses can include, but are not limited to, existing support, existing operational/support activities, existing products, planned O&S environment, and locations.

5.6.2.5 Activity B.1.4, Intended Use/Capabilities Report.

The content of the report is dependent upon each program's unique requirements (OMS/MP & CONOPS). The following, while not all inclusive, is a list of recommended items that the government may wish to include: identification of the product, procuring activity, preparing activity, contract number, and pertinent supportability parameters related to the intended application. The following data should also be included:

a. Operating requirements consisting of the number of missions per unit of time, mission duration, and number of operating days, miles, hours, firings, flights, or cycles per unit of time.

b. Number of products supported.

c. Transportation factors (e.g., mode, type, quantity to be transported, destinations, transport time and schedule).

d. Allowable maintenance periods.

e. Environmental requirements.

f. Developing support alternatives.

g. Results of field visits to operational units and support activities.

h. Updates to the report as information becomes available.

5.6.2.6 Additional Information.

None.

5.6.3 Activity B.2, Support System Standardization.

Due to the impacts of standardization on mission performance, reliability, maintainability, safety, quality, and survivability, a comprehensive program will include participation from supportability activities as well as other system engineering disciplines. Standardization through mission hardware and software standardization programs, such as Modular Open System Architecture, can help minimize equipment and parts proliferation, reduce life cycle costs, increase system readiness, and increase standardization and interoperability levels.

5.6.3.1 Overview.

Support system standardization supports optimization of life cycle cost and logistics footprint.

5.6.3.1.1 Purpose.

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To define supportability and supportability related design constraints for the new system/equipment based on existing and planned logistic support resources which have benefits due to cost, manpower, personnel, readiness, or support policy considerations, and to provide input into mission hardware and software standardization efforts. It also provides support related input to other standardization efforts, for example standardization program and parts control program.

5.6.3.1.2 Required for.

Initial activity results support the TMRR strategy. Results of further iterations of this activity are used in the CDD. Failure to accomplish this activity may result in the development of unnecessary support items and lack of standardization of support items across products.

5.6.3.1.3 When Required.

Activity B.2 is initiated during MSA to establish support system standardization requirements prior to initiation of the design effort. This activity continues to be iterated to progressively lower hardware levels from TMRR through EMD. During the P&D phase, Activity B.2 is generally applicable to design changes only.

5.6.3.1.4 Applicable LPD Summaries.

LSA-008, LSA-011, LSA-012, LSA-013, LSA-014, LSA-024, LSA-025, LSA-026, LSA-037, LSA-070, LSA-071, LSA-072, LSA-074, LSA-075, LSA-076, and LSA-077.

5.6.3.1.5 Associated Standards.

SAE TA-STD-0017A.

5.6.3.1.6 Associated Products.

Quantitative Supportability & Supportability Design Constraints, Standardization Approach, Documented Risk, Supportability Factors Relative to System.

5.6.3.1.7 Responsibility.

The government is responsible for performing the B.2 activity during MSA and through the design reviews in TMRR. After the design reviews the contractor assumes responsibility for performing this activity through the remaining phases, with the government retaining overall responsibility.

5.6.3.1.8 LPD Documentation.

None.

5.6.3.2 Activity B.2.1, Support Resource Standardization.

Once existing and planned resources have been analyzed and the benefits determined, then system/equipment requirements and constraints should be identified and documented to achieve the benefits. To achieve benefits from support system standardization, supportability and supportability related design requirements should be established prior to initiation of design efforts to facilitate minimized redesign costs. At the same time, performance of this activity should only define requirements to the level necessary based on the projected level of design effort. For example, only system and subsystem level support standardization requirements should be identified if only system and subsystem level design alternatives are to be developed and evaluated.

5.6.3.3 Activity B.2.2, Standardization Costs.

Provide supportability, cost, and readiness related information into mission hardware and software standardization efforts. This input should be provided to a level commensurate with the level of mission hardware and software standardization being pursued.

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5.6.3.4 Activity B.2.3, Hardware/Software Standardization Approaches.

Identify recommended mission hardware and software standardization approaches which have utility due to cost, readiness, or supportability considerations and participate in the system/equipment standardization effort. This task should be performed to a level of indenture commensurate with the design development.

5.6.3.5 Activity B.2.4, Standardization Risks.

The Support System Standardization effort and benefits may be applied to other resources under development, such as a system of systems. The cost associated with these types of development may be spread over several end items. However, the risk involved is increased because the developmental item is unproven in an operational environment and is subject to program delays or cancellation. Support System Standardization requirements can also arise from DoD or service support policies. Examples of these requirements can include standard software language requirements or use of standard multi-system test equipment.

5.6.3.6 Additional Information.

The paragraph below contains useful information regarding this activity and sub-activities.

5.6.3.6.1 Standardization.

Standardization through mission hardware and software standardization programs (MIL-STD-11991, and SD-19) can help minimize equipment and parts proliferation, reduce life cycle costs, increase system readiness, and increase standardization and interoperability levels between services and countries. A comprehensive standardization program will include participation from supportability activities as well as the other system engineering disciplines, due to the impacts of standardization on mission performance, reliability, maintainability, safety, quality, and survivability. Standardization approaches will generally be investigated starting in the MSA phase due to standardization and interoperability considerations and continue to progressively lower levels of indenture throughout the acquisition program. This effort is normally included as a separate contract requirement and care should be exercised in citing Activity B.2 (Activity B.2.2 and B.2.3) to avoid duplication of effort. The standardization program can normally provide the required data for Activities B.2.2 and B.2.3. Document all risks (B.2.4) associated with B.2.1, B.2.2, and B.2.3 (reference Appendix C of this document, Table C-I). Additionally, care should be exercised in the performance of this activity to ensure that standardization requirements are not established on poor performance items or items which can be significantly improved.

5.6.4 Activity B.3, Comparative Analysis.

A key to having an effective PSA program is efficient analysis and use of the data obtained on comparative systems. This process is also called a historical data review. It involves making good use of experience/information available from other systems/equipment so that the new system/equipment will demonstrate an improvement in supportability as well as performance. When a realistic comparative system can be established, information on the comparative system helps identify the following:

a. High failure rate potential of subsystems and components.

b. Major downtime contributors.

c. Design features which enhance supportability.

d. Potential supportability problem areas to include design features, DMSMS, and obsolescence which degrade supportability.

e. Design concepts with potential safety or HSI impacts (refer to SAE 6906).

f. Gross requirements for product support resources.

g. Design, operational, and support concepts which drive the product support requirements, O&S costs, and achieved readiness levels of the system/equipment.

h. Corrosion prevention and mitigation lessons learned.

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5.6.4.1 Overview.

During this activity, select or develop a Baseline Comparison System (BCS) representing characteristics of the new product.

5.6.4.1.1 Purpose.

There are four major goals associated with Activity B.3:

a. To define a sound analytical foundation for making projections for new system/equipment parameters and identifying targets of improvement.

b. To project supportability related parameters and make judgments concerning the feasibility of the new product supportability parameters.

c. To identify the supportability, cost, and readiness drivers for the new system/equipment.

d. To identify risks involved in using comparative system data in subsequent analyses.

5.6.4.1.2 Required for.

Initial activity results are used to develop the supportability factors to be incorporated in the CDD. The results of subsequent comparative analyses are included in the CDD. Analysis results are also used to develop PSA input data required for application of product support modeling techniques. Failure to accomplish this activity in conjunction with analysis of alternatives may result in an ICD/CDD that does not optimally define the system support objectives of the new system.

5.6.4.1.3 When Required.

Supportability factors should be identified in the initial CDD during the MSA phase and revised supportability factors are included in the CDD updates through the EMD phase.

5.6.4.1.4 Applicable LPD Summaries.

LSA-001, LSA-012, LSA-018, and LSA-023.

5.6.4.1.5 Associated Standards.

SAE TA-STD-0017A, Air Force Manual (AFMAN) 65-506, AFI 65-501.

5.6.4.1.6 Associated Products.

DI-MISC-80711A.

5.6.4.1.7 Responsibility.

The government is responsible for Activity B.3 during the development of the ICD and the MSA phase. The contractor is responsible for performing and updating Activity B.3 during the TMRR and EMD phases with the government retaining overall responsibility.

5.6.4.1.8 LPD Documentation.

SAE GEIA-STD-0007 entities impacted are Operations and Maintenance (A Entities), Reliability Requirements and Analysis (B Entities), Facility Requirements (F Entities), and Cross Functional Requirements (X Entities).

5.6.4.2 Activity B.3.1, Comparative Products.

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Identify and evaluate existing products (hardware, operational systems, and support frameworks) that can be used as benchmarks for new product alternatives. This involves selecting different comparative products whenever new product alternatives differ significantly in design, functionality, or support structures. The goal is to ensure all relevant parameters are adequately compared.

5.6.4.3 Activity B.3.2, BCS.

Identifying comparative systems and subsystems and establishing BCSs requires a general knowledge of the design, operational, and support characteristics of the new system/equipment, and the type of parameter to be projected. When design parameters (Reliability and Maintainability, etc.) are to be projected, then current operational systems/equipment which are similar in design characteristics to the new system/equipment's design characteristics should be identified. When major subsystems have been identified for the new system, the BCS being utilized for projecting design parameters may be a composite of subsystems from multiple systems. When support parameters (resupply time, turnaround times, transportation times, personnel constraints, etc.) are to be projected, then current support systems which are like the new system/equipment's support concept should be identified. This may be a support system completely different than the one supporting similar systems/equipment in design characteristics.

5.6.4.4 Activity B.3.3, BCS Logistics Requirements.

Determines the O&S costs, product support resource requirements. RAM values and readiness values of the comparative products are identified for each BCS established. These logistics and RAM requirements will assist in identifying the quantitative data that feeds into the RAM-C and logistics comparison. BCS are often used for the RAM-C to verify feasibility of sustainment KPP requirements.

5.6.4.5 Activity B.3.4, BCS Qualitative Constraints.

Qualitative constraints identify supportability problems (Activity B.3.4) on existing systems and should be thoroughly analyzed to provide insight into areas for improvement during the development of the new system/equipment. These include, but are not limited to, qualitative environmental, health-hazard, safety, and supportability issues.

5.6.4.6 Activities, B.3.5 and B.3.6, BCS Supportability, Cost, and Readiness Drivers and Unique System Drivers.

Supportability, cost, readiness, and unique drivers are documented (Activities B.3.5 and B.3.6) so that areas of improvement can be identified, and supportability related design constraints can be formulated to achieve the improvements. Major problems on existing systems should be identified and approaches to eliminate or reduce these problems should be developed. As with other activities in this handbook, the timing and scope of this effort should be commensurate with the timing and scope of the system/equipment design effort for the constraints to be effective. MSA phase and TMRR phase analyses would be at the system and subsystem level so that system and subsystem level constraints could be defined prior to entry into the EMD phase.

5.6.4.7 Activity B.3.7, BCS Updates.

Update the comparative products, their associated parameters, and the supportability, cost, and readiness drivers as the new product alternatives become more clearly defined, or as more accurate data is obtained on the comparative products. If current available options are not compatible for all desired parameters, seek to include additional options that do match parameters. The updated BCS should be used as the new baseline comparison system for ongoing comparative analysis and ultimately should represent the new product once it is commissioned for service.

5.6.4.8 Activity B.3.8, BCS Risks.

Assumptions made in establishing a comparative system and associated risks (Activity B.3.8) involved play an important role in determining the accuracy of the new system/equipment projections. Low similarity between the new system/equipment's design, operation, or support concept and existing systems should be documented and new system/equipment projections treated accordingly. Additionally, inherent risks are involved in constructing composite comparative systems unless operational environment differences are identified and the supportability, cost, and readiness values adjusted accordingly. Examples could include capturing and

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identifying product projections not documented, operational/environmental differences not captured, support system not optimal, and supportability cost and readiness values not adjusted. For more information on risk management, refer to the Risk, Issue, and Opportunity Management Guide for Defense Acquisition Programs.

5.6.4.9 Additional Information.

The paragraphs below contain useful information regarding this activity and sub-activities.

5.6.4.9.1 Level of Detail in a BCS.

The level of detail required in describing comparative systems will vary depending on the amount of detail known on the new system/equipment's design, operational, support characteristics, and the accuracy required in the estimates for new system/equipment parameters. Comparative systems and subsystems are normally identified by the requiring authority. BCSs should be established at a level commensurate with expected design progression. When the performing activity is a contractor, the level of comparison should be specified, as well as data sources to be used. Activities B.3.1 and B.3.2 are designed to provide for different levels of detail in identifying comparative systems. For example, if the design concept for the new system/equipment is very general, then only a general level comparative system description (Activity B.3.1) should be established. When more detail and accuracy are required, then Activity B.3.2 should be used. However, as more detail is required the cost of the analysis increases, therefore, the appropriate activity should be selected accordingly.

5.6.4.9.2 IPS Elements.

Supportability, cost, and readiness drivers may be identified from multiple perspectives: drivers could be specific IPS elements; specific support functions (e.g., alignment or calibration requirements); specific mission subsystems/components; or specific features of the operational scenario/requirement. Proper driver identification is a prerequisite to the establishment of the most effective constraints for achieving improvements. Care should be exercised to ensure that true drivers are identified, not the effects of a driver. For example, supply support cost is not a cost driver if it is a result of poor reliability of a subsystem. In this case, the subsystem reliability would be the cost driver. The identification of drivers is dependent upon the availability of data on comparative systems. When citing Activities B.3.5 and B.3.6, the requiring authority should consider the data available to identify the support drivers. Additionally, this activity can be performed by specialty areas and the results consolidated under the PSA program. For example, manpower, personnel, and training analysis may be performed by HSI and training specialists, and maintainability comparisons may be done under the maintainability program.

5.6.4.9.3 Comparative System Report.

To document the results of Activity B.3 consider developing a Comparative Analysis Report. The content of the report is dependent upon each program’s unique requirement. The following, while not all inclusive, is a list of recommended items that the government may wish to include.

a. Identification of the product, procuring activity, preparing activity, and contract number.

b. Identification of existing systems and subsystems (hardware, operational, and support) useful for comparative purposes with new product alternatives.

c. O&S costs, product support resource requirements, R&M values, and readiness values of the comparative systems and subsystems along with an identification of the data sources used in developing the data.

d. Qualitative supportability problems on comparative systems which should be prevented on the new product.

e. Supportability, cost, and readiness drivers for the new product and rationale used in identifying the drivers.

f. Any risks and assumptions associated with the comparative system and their associated parameters.

5.6.5 Activity B.4, Technological Opportunities.

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This activity should be performed by design personnel in conjunction with supportability specialists. Activity B.4.1 is designed to identify potential technological approaches, such as IDE-PS and modeling simulation and analysis tools which includes digital thread, digital twin, and advanced manufacturing, to achieve new system/equipment supportability improvements. It will identify the expected effect of improvements on supportability, cost, and readiness values so that supportability and supportability related design objectives for the new system/equipment can be established. Particular attention should be devoted to the application of technological advancements to system/equipment drivers and areas where qualitative problems were identified on comparative systems. Improvements can be developed at any level (system, subsystem, or below); however, they should be prioritized based on the contribution of each to system and subsystem level supportability values. Activity B.4.2 focuses on the continuous updating of all aspects of Activity B.4. Technological advances occur throughout system development and should be considered throughout the life cycle. Activity B.4.3 identifies any risks in adopting new technology for a particular system design. In addition to identifying those risks, a mitigation plan should be developed for any risks deemed acceptable.

5.6.5.1 Overview.

This activity identifies and evaluates design opportunities for improvement of supportability characteristics and requirements in the new product.

5.6.5.1.1 Purpose.

To identify technological advancements and state-of-the-art design approaches offering opportunities to achieve new system support improvements. Use of available technology is emphasized to improve projected safety, cost, support, and readiness values, which reduce a new system's environmental impact, and resolve qualitative support problems or constraints identified. Services should consider enterprise solutions to support PSA and other technological opportunities.

5.6.5.1.2 Required for.

Recommended design objectives and associated risks identified by Activity B.4 are included in the CDD. Updated design objectives are incorporated in the CDD. Failure to accomplish this activity may result in a less than capable product and corresponding support system.

5.6.5.1.3 When Required.

Activity B.4 is initiated during the MSA phase and updated during the TMRR phase. This activity is only selectively applicable during EMD.

5.6.5.1.4 Applicable LPD Summaries.

None.

5.6.5.1.5 Associated Standards.

SAE TA-STD-0017A.

5.6.5.1.6 Associated Products.

Include, but not limited to, ILS SOW, LCSP, Test and Evaluation Master Plan (TEMP), SEP.

5.6.5.1.7 Responsibility.

The government is responsible for Activity B.4 during MSA. The contractor is responsible for performing and updating this activity during TMRR with the government retaining overall responsibility.

5.6.5.1.8 LPD Documentation.

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None.

5.6.5.2 Activity B.4.1, Identify Potential Technology.

Establish design technology approaches to achieve supportability improvements on the new product over existing products. These design approaches should be established through the following:

a. Identifying technological advancements and other design improvements which can be exploited in the new product's development, and which have the potential for reducing product support resource requirements, reducing costs, reducing environmental impact, improving safety, or enhancing product readiness.

b. Estimating the resultant improvements that would be achieved in the supportability, cost, environmental impact, safety, and readiness values.

c. Identifying design improvements to logistic elements (such as support equipment and training devices) that can be applied during the new product's development to increase the effectiveness of the support system or enhance readiness.

d. Identifying technological advancements in engineering design approaches, such as the use of digital twin or digital thread technologies.

e. Identifying technological advancements in manufacturing approaches, such as advanced manufacturing or additive manufacturing.

5.6.5.3 Activity B.4.2, Update Design Objectives.

Update the design objectives as new product alternatives become more clearly defined.

5.6.5.4 Activity B.4.3, Technology Risks.

Identify any risks associated with the design objectives established, and any development and evaluation approaches needed to verify the improvement.

5.6.5.5 Additional Information.

The paragraph below contains useful information regarding this activity and sub-activities.

5.6.5.5.1 Technological Opportunities Report.

This report will identify design opportunities which can be incorporated into new products to achieve improvement in supportability characteristics. The content of the report is dependent upon each program's unique requirements. The following, while not all inclusive, is a list of recommended items that the government may wish to include.

a. Identification of the product, procuring activity, preparing activity, and contract number.

b. Identification of technological advancements and other design improvements which can be exploited in the new product which have the potential for reducing product support resource requirements, reducing costs, or enhancing system readiness.

c. Estimates of the resultant improvements that would be achieved in supportability cost, and readiness values of the new product if proposed design technology approaches were implemented.

d. Identification of design improvements that can be applied to the product support elements of the new product to improve the effectiveness of the support system or enhance readiness.

e. Description of any risks associated with new technology in the design.

f. Identification of any development and evaluation approaches needed to verify the improvement potential.

g. Identification of any cost or schedule impacts to implement the potential improvements.

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5.6.6 Activity B.5, Supportability and Supportability Related Design Factors.

This activity establishes the supportability parameters governing the new system/equipment's development. The Product Support Manager (PSM) should prioritize supportability in both the system design and initial contract to minimize operating and support (O&S) costs and achieve the desired operational outcomes. Initially, analyze existing and planned resources to assess benefits, then identify and document system/ equipment requirements and constraints needed to realize these benefits. It is crucial to establish supportability requirements and design standards before commencing the design process to reduce redesign costs. Define requirements only to the extent necessary based on the level of design effort. For example, if only system and subsystem-level design alternatives are being developed, then support standardization requirements should be specified accordingly. This approach sets the supportability parameters for the new system or equipment, including the design, objectives, thresholds, constraints, and specification requirements.

5.6.6.1 Overview.

This activity establishes the quantitative operations and support characteristics of alternative design and operational concepts. It also has support related design objectives, goals, thresholds, and constraints for inclusion in requirement, decision, and program documents and specifications.

5.6.6.1.1 Purpose.

Establishes quantitative operations and support characteristics of alternative design and operational concepts. It also has support related design objectives, goals and thresholds, and constraints for inclusion in requirement, decision, and program documents and specifications.

5.6.6.1.2 Required for.

Input to the CDD and CDD update. The translation of these support related design objectives, goals, and thresholds into support requirements for inclusion in specifications is a critical element of this task. Failure to accomplish this activity may result in an ICD/CDD that does not optimally define the system support objectives and product metrics for the new system.

5.6.6.1.3 When Required.

Most of Activity B.5 is initiated during MSA and updated through EMD. Activity B.5.7 Update objectives, goals, and thresholds is only applicable during the TMRR phase. Activity B.5.1 (Pre-Milestone A) Tradeoffs established from Activity B.4 are analyzed for most cost-effective solution to the mission need. (Post-Milestone A) Thresholds are minimum KPPs that should be satisfied in Acquisition.

5.6.6.1.4 Applicable LPD Summaries.

LSA-003, LSA-004, LSA-012, LSA-019, LSA-023, LSA-024, LSA-050, and LSA-075.

5.6.6.1.5 Associated Standards.

SAE TA-STD-0017A, TA-HB-0007-1, Federal Acquisition Regulation (FAR) Chapter 1 of Title 48 of the Code of Federal Regulations, 48 CFR 1, DoDI 5000.91, DoDI 5000.02.

5.6.6.1.6 Associated Products.

Sensitivity of Support Tradeoffs, Sensitivity Analysis, Support System Tradeoffs, Supportability Design Parameter Risks, Risk Mitigation Strategy.

5.6.6.1.7 Responsibility.

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The government is responsible for Activity B.5 during MSA. The contractor is responsible for performing and updating this activity during TMRR and subsequent phases with the government retaining overall responsibility.

5.6.6.1.8 LPD Documentation.

SAE GEIA-STD-0007 entities impacted are Operations and Maintenance (A Entities), Skill and Training Requirements (G Entities), Reliability Requirements and Analysis (B Entities), Task Analysis (C Entities), Skill and Training Requirements (G Entities), Support Equipment Data (E Entities), Provisioning and Cataloging Requirements (H Entities), and Cross Functional Requirements (X Entities).

5.6.6.2 Activity B.5.1, Supportability Characteristics.

To establish supportability characteristics, first identify the quantitative supportability aspects resulting from alternative design and operational concepts. Define the supportability objectives, goals, thresholds, and constraints for the new system or equipment, and include these in program approval documents, specifications, and contracts. Quantify operational characteristics in terms of manpower and personnel requirements, job aptitudes, skill needs, and performance standards for each task. For supportability capabilities, include feasible support concepts, estimates of manpower requirements, aptitude and skill requirements for each job, performance standards, reliability and maintainability (R&M) parameters, product readiness, operating and support (O&S) costs, and resource requirements. Also, account for any potential changes to the existing logistics footprint and real property facilities, and ensure that all intended operational and support environments are considered.

5.6.6.3 Activity B.5.2, Sensitivity Analysis.

Conduct sensitivity analysis on the variables associated with the supportability, cost and readiness drivers identified for the new system/equipment.

5.6.6.4 Activity B.5.3, Intellectual Property and Data Rights.

Intellectual Property (IP) and Data rights should be addressed as early as possible during the acquisition process. This is critical for ensuring supportability. By securing the appropriate rights, the government can effectively maintain, upgrade, and manage systems throughout their life cycle, ensuring that they remain operational and effective.

In federal acquisition, IP and data rights play a crucial role in ensuring supportability for defense systems and other government acquisitions. IP encompasses information created through objective reasoning, such as patents, copyrights, trademarks, and trade secrets, while data rights refer to the government's rights to access, use, and control data related to the acquired systems or equipment.

When acquiring systems or equipment, the government should address IP rights to ensure ongoing supportability. IP rights determine who holds the ownership and control over innovations and designs. The Federal Acquisition Regulation (FAR) and Defense Federal Acquisition Regulation Supplement (DFARS) provide guidelines for IP rights in federal contracts. If a contractor holds a patent, copyright, or trade-secrets for technology used in a system, the government may need a license to use, modify, or share the patented technology. Ensuring that the government has the necessary rights is essential for maintaining and supporting the system throughout its life cycle. For software and technical documentation, copyright protections apply. Data rights are crucial for managing the supportability of federal acquisitions. They define the government's ability to access, use, and disseminate technical data and software related to the system. An example of the type of data requested would be Operation, Maintenance, Installation, or Training (OMIT).

5.6.6.5 Activity B.5.4, Identify Risks.

Identify the risks and uncertainties involved in achieving the objectives established. Identify any risks associated with technology planned for the new product. Identify risks associated with each support alternative in terms of cost, performance, schedule, and impact to the other elements of Product Support. Establish supportability, cost, environmental impact, and readiness objectives for the new system. Identify the risks and uncertainties involved in achieving the objectives established. Identify any risks associated with new

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technology planned for the new system/equipment. Risk management tools support the implementation and execution of risk management. The PM should select the appropriate tool(s) early and document details in the SEP. The Services have developed or endorsed specific risk management tools.

5.6.6.6 Activity B.5.5, Key Performance Parameters.

KPPs are developed to translate operational and product supportability objectives, goals, and thresholds into specific requirements for the system, subsystem, or support system including the Sustainment KPP. Ensure that specifications or contract parameters include only what can be controlled through design and support system development. Account for external factors like Government Furnished Equipment (GFE), administrative delays, and other uncontrollable elements. For instance, if the manpower threshold is 100 man-hours per system per year and a GFE subsystem needs 25 man-hours, the contract should set a threshold of 75 man-hours per system per year for the hardware developed by the performing activity.

Include relevant readiness parameters in the system specification for complete weapon systems. For subsystems or equipment that will be integrated into a weapon system, focus on logistic-related reliability and maintainability (R&M) parameters.

Set objectives for supportability, costs, environmental impact, and readiness for the new product. Address environmental impact with constraints on hazardous materials, waste, and pollutants, including both quantitative and qualitative measures. Key Performance Parameters (KPPs) are critical attributes necessary for effective military capability, outlined in the Capability Development Document (CDD) and included in the Acquisition Program Baseline (APB). KPPs should be measurable, testable, and support efficient Test and Evaluation (T&E), with mandatory KPPs specified in the JCIDS Manual.

5.6.6.7 Activity B.5.6, Market Limitations.

By understanding and addressing market limitations, supportability can be enhanced, ensuring that systems remain operational, efficient, and cost-effective throughout their life cycle. Below are examples that systems will have to navigate:

a. Supplier Capabilities: Assess the availability of suppliers with the necessary specialized expertise for maintaining complex systems. Limited supplier options can lead to delays or increased costs for support. Ensure that service providers are qualified and capable of meeting support requirements.

b. Design and Integration Challenges: Evaluate the compatibility of new systems with existing infrastructure to avoid integration issues that may require additional modifications.

c. Regulatory and Compliance Constraints: Navigate complex regulatory and compliance standards that can impact supportability design and maintenance. Ensure that contracts and support plans adhere to required certifications and approvals, which may limit the pool of eligible vendors.

d. Supply Chain Dependencies: Address risks associated with supply chain dependencies, such as limited availability of critical parts and logistics challenges. Plan for potential disruptions to ensure resilient, timely and efficient system support.

e. Technological Obsolescence: Prepare for the rapid pace of technological change that can render support tools and systems outdated. Develop plans to update or replace outdated technology and address maintenance needs for legacy systems.

f. Security and Sensitivity Issues: Implement stringent security measures for systems involving sensitive or classified information. Ensure that cybersecurity requirements are met and consider how these requirements may limit the number of eligible service providers.

g. Vendor Stability: Evaluate the stability of vendors to ensure they can provide reliable long-term support. Monitor vendor performance and stability to prevent potential disruptions in support services.

5.6.6.8 Activity B.5.7, Update Objectives, Goals, and Thresholds.

It is essential to update the supportability and supportability-related key performance parameters to ensure they are accurately reflected in specifications, requirements documents, and contracts. This process involves revising the parameters for comparative systems, as well as the supportability, cost, and readiness drivers, in

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response to more precise definitions of new system/equipment alternatives and improved data on existing systems and subsystems. Updates to requirements should trigger updates to RAM-C, this helps ensure validity of requirements updates in meeting top level KPPs. This ongoing refinement ensures that all relevant documents and agreements are aligned with the latest information and requirements.

5.6.6.9 Activity B.5.8, Advanced Manufacturing.

Advanced manufacturing: Advanced manufacturing, as outlined by SAE TA-STD-0017A, encompasses a broad range of activities that integrate cutting-edge technologies and methodologies. This includes the use of information, automation, computation, software, sensing, and networking, as well as the application of advanced materials and emerging capabilities from the physical and biological sciences. Key components of advanced manufacturing include additive manufacturing (3D printing), artificial intelligence, robotics, and advanced composite materials. These technologies enable not only innovative manufacturing techniques for existing products but also the creation of entirely new products through advanced technological processes.

In compliance with federal regulations, the Services are committed to developing a comprehensive, threat-based strategy for investing in and utilizing these advanced manufacturing methods and materials. This strategy will ensure that advanced manufacturing is integrated at all stages of a system's life cycle, from initial design through to deployment and maintenance. Effective execution of this strategy will necessitate collaboration with the private sector, leveraging industry partnerships to drive technological advancements and investment. To support this, the Services' policies include incentives to encourage industry participation and investment in advanced technologies.

Moreover, it is essential to consider the implications of intellectual property and the return on investment when employing advanced manufacturing techniques. Protecting intellectual property ensures the security of technological innovations, while a careful evaluation of return on investment helps to assess the financial viability and benefits of adopting these advanced methods. By addressing these factors, the Services can fully leverage the potential of advanced manufacturing to enhance operational capabilities and maintain technological superiority.

5.6.6.10 Additional Information.

The paragraphs below contain useful information regarding this activity and sub-activities.

5.6.6.10.1 Supportability Objectives.

The type of parameter developed as a result of performing Activity B.5 will depend on the phase of development. Generally, prior to Milestone A, supportability objectives will be established (Activity B.5.5). These objectives are established based on the results of previous mission and support systems definition tasks, especially the opportunities identified as a result of Activity B.4 and are subject to tradeoffs to achieve the most cost-effective solution to the mission need. After Milestone A and prior to Milestone B, goals and thresholds are established which are not subject to tradeoff. Thresholds represent the minimum essential levels of performance that should be satisfied at specified points in the acquisition.

5.6.6.10.2 Supportability Incentives.

When developing Key Performance Parameters (KPPs), thorough consideration should be given to possible supportability incentives which may be included in the contract. However, incentives should be at the system level (possibly subsystem for some acquisitions) to prevent optimization approaches at lower levels which do not represent optimum system level solutions. This should not preclude component level initiatives such as reliability improvement warranties. Also, provide in the contract a method to measure KPPs to ensure they are achieved before the incentive is awarded.

5.6.6.10.3 Additive Manufacturing.

Additive manufacturing (AM) represents a transformative approach to manufacturing and fabrication, particularly within the DoD system acquisitions and supply chain logistics. Defined by the ability to create objects layer by layer from three-dimensional model data, additive manufacturing contrasts with traditional

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subtractive and formative manufacturing methods. Key technologies in this field include 3D printing, powder bed fusion, and cold spray.

According to DoDI 5000.93, "Use of Additive Manufacturing in the DoD," additive manufacturing should be considered throughout the system acquisition process. The directive emphasizes the importance of evaluating how AM can influence weapons systems design and how contracts or agreements will address the availability of AM parts and data for maintenance and sustainment. This directive reflects the growing recognition of AM's potential to enhance various aspects of system supportability and readiness.

Additive manufacturing offers significant benefits, including the ability to circumvent limitations inherent in traditional manufacturing methods. It provides a viable solution for addressing component obsolescence and other scenarios that can affect mission readiness. By incorporating AM into the acquisition and sustainment strategies, the DoD can leverage these advancements to improve operational efficiency and adaptability.

Incorporating additive manufacturing into the design and maintenance phases requires careful consideration of its impact on supportability-related factors. As such, additive manufacturing should be evaluated as a strategic support concept when updating objectives and strategies. This approach ensures that the DoD fully capitalizes on the advantages of AM while addressing the challenges associated with its implementation.

5.6.6.10.4 JAMMEX.

JAMMEX is the DoD-wide Joint Additive Manufacturing Model Exchange and is open to all participating Services. The DoD utilizes the Joint Additive Manufacturing Model Exchange (JAMMEX) for its DoD AM data framework. This framework allows for the interoperable data management capability enables DoD entities to securely access and share, buy, or license AM data as required, using common data management that best practices and proper configuration controls. The JAMMEX tool is located online at https://www.dla.mil/.

5.6.6.10.5 Implementation of Advanced Manufacturing and Additive Manufacturing.

Advanced manufacturing alleviates design limitations traditional manufacturing methods impose, allowing for the production of complex parts that cannot be manufactured using traditional processes. These optimized designs, coupled with lighter and stronger advanced materials, can result in improved system performance. Additionally, advanced manufacturing will allow the Army to innovate with unparalleled speed because it enables rapid production of prototypes, leading to decreased development time and faster iterations, and also enables production scalability. Using advanced methods, the Army can quickly establish a production line and increase throughput of systems, subsystems, and parts. As such, advanced methods can reduce the time to fielding, ensuring that warfighters receive critical capabilities when needed. Reference DoDI 5000.93 and Army Directive 2019-29.

5.6.6.10.6 Energy Key Performance Parameter.

The Energy Key Performance Parameter (E-KPP) ensures system capability by balancing the energy performance of systems and the provisioning of energy resources. The energy focus optimizes fuel and electric power demand in capability solutions as it directly affects the ability to provide and protect critical energy supplies. Energy sustainability can be a critical enabler or constrictor of operations and is key to meeting new operational concepts. The E-KPP identifies energy demands and supply relationships such as miles per gallon or miles per hour. Energy consumption directly affects the sustainability of the system to provide and protect critical energy supplies. System owners should consider the EPP early in system development (Pre MSA - MSA phase).

The Energy KPP is a mandatory KPP that is intended to optimize fuel and electric power demand in capability solutions as it directly affects the burden on the force to provide and protect critical energy supplies. JCIDS manual ANNEX E to APPENDIX G to ENCLOSURE B is the E-KPP guide which outlines the Operational Implications of Energy, Methodology, and Energy Performance Attributes of the Key Performance Parameter.

5.7 Activity Group C, Preparation and Evaluation of Alternatives.

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Preparation and Evaluation of Alternatives optimizes the new support system to develop the new product's support solution, which achieves the best balance between life cycle costs, schedule, performance, and supportability. This group utilizes analysis such as Failure Mode Effects Critically Analysis (FMECA), Fault Tree Analysis (FTA), and RCM to identify items to be redressed through corrective and preventative maintenance initiatives.

5.7.1 General Considerations.

Design alternatives for each of the system's functional elements are identified and analyzed. The results are used to select the best combination of element designs to achieve the system objective. System analysis and control activities in a program serve as a basis for evaluating alternatives, selecting the best solution, measuring progress, and documenting design decisions.

5.7.2 Activity C.1, Functional Requirements.

Identification of the operating and maintenance functions for the new system/equipment should coincide with critical design decisions to ensure development of a system which achieves the best balance between cost, schedule, performance, and supportability. Apply the concept of Affordable System Operational Effectiveness (ASOE) to these functions to explain the dependency and interplay between system performance, availability (reliability, maintainability, and supportability), process efficiency (system operations, maintenance and product support), and the system life cycle. Special emphasis should be given to functional requirements that impact supportability, cost, or readiness for the new system/equipment. Additionally, attention should be directed toward any new functions introduced by advanced design technologies or new operational concepts. Identify the design margins and support system resources that will respond to the customer's Mission Profile requirements. The PSA program under Activity C.1 consolidates the functional requirements developed by the appropriate specialty areas to ensure the support system developed for the new system/equipment satisfies all functional requirements. For software reliability refer to IEEE 1633.

5.7.2.1 Overview.

This activity identifies the operations, maintenance, and support functions that will be performed in the intended environment for each product alternative under consideration; identifies the human performance requirements for operations, maintenance and support; and documents the requirements in a task inventory.

5.7.2.1.1 Purpose.

To identify missions (e.g., shoot, move, communicate), maintenance, and support (transport, maintain, dispose) functions that should be performed for each system/equipment alternative in the intended environment. It also identifies requirements for operations, maintenance and support, and documenting task performance requirements in a task inventory.

5.7.2.1.2 Required for.

Detailed operations and maintenance task identification, formulation of design alternatives, identification of functional requirements, and their associated risks are normally included in the CDD. Failure to accomplish this activity negatively affects the optimization of the maintenance and support systems.

5.7.2.1.3 When Required.

Functional requirements begin in the MSA phase. FMECA, FTA, RCM, task inventory, and design alternatives may be deferred to the TMRR phase. Applicable activities are updated during EMD. During PD functional requirements are normally only applicable to design changes.

5.7.2.1.4 Applicable LPD Summaries.

LSA-005, LSA-007, LSA-008, LSA-009, LSA-011, LSA-012, LSA-013, LSA-014, LSA-016, LSA-018, LSA-021, LSA-024, LSA-025, LSA-026, LSA-027, LSA-033, LSA-036, LSA-037, LSA-039, LSA-040, LSA-046,

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LSA-050, LSA-051, LSA-055, LSA-056, LSA-058, LSA-068, LSA-070, LSA-071, LSA-072, LSA-074, LSA-075, LSA-076, LSA-077, LSA-078, and LSA-085.

5.7.2.1.5 Associated Standards.

SAE TA-STD-0017A, SAE GEIA-STD-0007, SAE GEIA-STD-0009, MIL-HDBK-470.

5.7.2.1.6 Associated Products.

FTA Results, Identification of Failures, Maintenance Concept, Preventive Maintenance Tasks, Corrective Maintenance Tasks, FMEA, FMECA Maintainability Information (FMECA/MI), On-Condition Tasks, Rework Tasks, Discard Tasks, Failure Finding Tasks, Redesign Recommendations.

5.7.2.1.7 Responsibility.

The government is responsible for Activity C.1 during MSA. The contractor is responsible for performing and updating this activity during TMRR and subsequent phases with the government retaining overall responsibility.

5.7.2.1.8 LPD Documentation.

SAE GEIA-STD-0007 entities impacted are Operations and Maintenance (A Entities), Reliability Requirements and Analysis (B Entities), Task Analysis (C Entities), Support Equipment Requirements (E Entities), Skill and Training Requirements (G Entities), Provisioning and Cataloging Requirements (H Entities), and Cross Functional Requirements (X Entities).

5.7.2.2 Activity C.1.1, Functional Requirement Identification.

Identify and document the functions that should be performed for the new system/equipment to be operated and maintained in its intended operational environment for each design alternative under consideration. These functions should be identified to a level commensurate with design and operational scenario development and should include both peacetime and wartime functions. The functional requirements for each mission are identified in the mission essential functions list. This is a key document to understanding critical functions and resultant critical failures. Functional flow block diagrams are a useful tool in identifying functional requirements and establishing relationships between functions. Additionally, other system engineering programs provide a significant input to the functional requirements identification process. For example, HSI specialists may be best qualified to identify and analyze operations functions, transportation specialists may be best qualified to identify and analyze transportation requirements, etc. As a system matures break the functional requirements down to the sub-system and component level.

5.7.2.3 Activity C.1.2, Unique Item Functions.

Identifying Unique Item Functions requires a detailed assessment of the system's functional requirements, particularly those that set the new system or equipment apart from previous or legacy systems. These unique functions often arise as a result of advancements in design technology, shifts in operational concepts, or specific factors driving supportability, cost, or readiness. This activity plays a critical role in ensuring that these unique functions are addressed early in the product development cycle, ensuring that any specialized support, training, or logistics requirements are identified and planned for. Unique item functions are essential to pinpoint early in the product development process. By identifying and analyzing these functions, stakeholders can ensure that they are adequately supported throughout the system's life cycle, reducing risks and maximizing effectiveness.

5.7.2.4 Activity C.1.3, Function Drivers.

This activity identifies the functions which are drivers and provides a basis for developing new support approaches or design concepts to enhance the supportability of the new system/equipment. Examples include, but are not limited to, downtime analysis, maintainability design evaluation, testability analysis, environmental drivers, operational usage, materials, HSI, cyber security, network infrastructure, interfaces, and hazards.

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5.7.2.5 Activity C.1.4, Function Risks.

Identify any risks in achieving the functional requirements of the new product. Identification of the new functional requirements provides the basis for management attention due to the potential supportability risks.

5.7.2.6 Activity C.1.5, Failure Modes and Effects Analysis (FMEA).

A FMEA analyzes product design and function, focusing on potential design related deficiencies, with emphasis on improving the design, function, and ensuring product operation is safe and reliable during useful life (reference SAE J1739). The identified failure modes will serve as a basis for determining the maintenance required for the product. The FMEA, or equivalent, is documented on product hardware and software and to the indenture level consistent with the design progression. Normally, the design starts off focusing on the functionality of the system by creating a Functional FMEA. As the design progresses the FMEA transitions from a functional FMEA to a Physical FMEA. FMEA is utilized to conduct a thorough evaluation of primary system functions, including power and cooling, to identify potential failure modes that can arise from physical component failures, and to assess their potential impact on system performance. FMEA is commonly used in industry acquisitions (refer to SAE ARP5580).

5.7.2.7 Activity C.1.6, FMECA.

A design FMECA systematically identifies the likely modes of failure, the possible effects of each failure, and the criticality of each effect on mission completion, environmental impacts, health hazards, and system safety. The FMECA requirements in general will be included under the Reliability Program. However, the supportability FMECA requirements for a system should be developed in conjunction with the PSA program requirements due to the necessity of having FMECA results to conduct some PSA activities. In particular, the FMECA provides the basis for built-in and external test specification and evaluation. This coordination should consider the timing of the FMECA, level of detail, and documentation requirements. ANSI/AIAA S-102.2.4 is an example of an industry standard that establishes uniform performance-based FMECA requirements and criteria. The FMECA product defined in the AIAA standard is comprised of these major components: Failure Mode and Effects Analysis (FMEA)/Failure Mode and Effects Criticality Analysis (FMECA), Risk Priority Analysis (RPA), Critical Item Analysis (CIA), and Failure Compensation Analysis.

The eight standard steps conducted during a FMECA are:

a. Define the System — the system definition should include the identification of all internal and interface functions, the performance of the system at each indenture level, any system restraints, and any failure definitions.

b. Define the Ground Rules and Assumptions — these aid in better understanding the results of the analysis. Some examples include mission of the item, operating time, source of source of failure rate data.

c. Build System Block Diagrams — Functional Diagrams and Reliability Block Diagrams should represent operations, interrelationships, and interdependencies. They allow traceability through each level of indenture.

d. Identify Failure Modes — all item and interface failure modes should be identified, understanding that any effects upon function, mission, or system should be determined

e. Analyze Failure Effects/Causes — accomplished on each item in the RBD. Consequences of each failure mode on operation and the next higher level should be identified.

f. Classify by Severity—severity provides qualitative measures of consequence. Severity is typically labeled as Catastrophic, Critical, Marginal, or Minor

g. Identify Means of Failure Detection, Isolation, and Compensation — answer how the failure is by the operator, how the failure isolated, and how is it compensated for (redundancy, monitor, back up)

h. Recommendations-design modifications or Fault Tree Analysis (FTA)

5.7.2.8 Activity C.1.7, FTA.

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FTA involves using deductive logic to determine the possible causes of a defined undesired operational result. It is a top-down failure analysis of a system that analyzes a series of lower-level events. The FTA methods of analysis are useful in functional paths of high complexity in which the outcome of one or more combinations of noncritical events may produce an undesirable critical event. Typical candidates for FTA are functional paths or interfaces which could have critical impact on the environment, flight safety, system safety, munitions handling safety, safety of operating and maintenance personnel, and support maintenance fault isolation. ANSI/AIAA S-102.2.18 and IEC 61025 are examples of industry standards that establish standardized requirements for developing a performance-based FTA. These standards describe the modeling components, symbols, and analytical objectives without mandating a particular computerized methodology or tool.

5.7.2.9 Activity C.1.8, RCM Analysis.

RCM analysis consists of a systematic approach of analyzing system/equipment reliability data to determine the feasibility and desirability of preventive maintenance activities. This highlights maintenance problem areas for design review consideration and establishes the most effective preventive maintenance program for the new system/equipment. RCM logic is applied to the individual failure modes of each reparable item in the system/equipment identified during the FMECA, through a progressive determination of how impending failures can be detected and corrected to preserve, to the degree possible, the inherent levels of reliability and safety in the system/equipment. DoDM 4151.25 provides guidance for the RCM process to achieve inherent reliability and restore deteriorated reliability for DoD materiel. The manual describes the essential elements of RCM and offers guidance on establishing and sustaining an RCM program. MIL-STD-3034 describes the DoD approved RCM methodology used for the determination of maintenance requirements along with SAE JA1011. The standard also provides the procedure to develop preventive, corrective, and inactive equipment maintenance within a planned maintenance management system. In addition to DoD guidance and standards, SAE JA1012, NAVAIR 00-25-403, and A4A MSG-3 are examples of industry standards that provide RCM evaluation criteria and processes.

5.7.2.10 Activity C.1.9, Task Inventory.

Task inventory is identified using three analysis techniques: (1) Failure Analysis (FMECA/FMEA and FTA), (2) RCM analysis, and (3) a detailed review of the system/equipment functional requirements. A task inventory should be prepared for the new military system/equipment or facility being acquired. The task inventory should be organized in terms of a task classification which defines objectives, scenarios, conditions, functions, jobs, duties, and tasks. Tasks should be identified to a level of detail commensurate with design and operational scenario development. Formulate design alternatives to correct design deficiencies uncovered during the identification of functions or operations and maintenance task requirements. The design alternatives that reduce or simplify functions should be analyzed to determine the optimal balance between the design requirements for the alternatives compared to the supportability requirements impacted or driven by each design alternative. The task inventory should be composed of task descriptions, each of which consists of:

a. An action verb which identifies what is to be accomplished in the task.
b. An object which identifies what is to be acted upon in the task.
c. Qualifying phrases needed to distinguish the task from related or similar tasks.

When developing the task inventory, the related assets such as task descriptions, subtask descriptions, warnings, cautions, notes and the like should be clear, concise, relevant, and written in a language appropriate for the operator or maintainer. Hazardous materials, generation of waste, release of air and water pollutants, and environmental impacts associated with each task should be identified. Collective tasks will be identified in the task inventory. All verbs should be unambiguously defined within the task classification. A list of preferred verbs is provided in SAE GEIA-STD-0007, LPD. Task descriptions may be supplemented by graphical displays or timeline charts. Where the same task appears in the duty of more than one job and is therefore identified as a collective task for training purposes, it will be identified as such within the task inventory. Task descriptions should be limited to information related to the task. Operations, preventive maintenance, corrective maintenance, and other support tasks such as preparation for operation, post operation, calibration, and transportation should be identified by the following methods:

a. Operations, maintenance, and other support tasks should be identified through analysis of the functional requirements of the new system/equipment considering mission analysis, operational analysis

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and scenarios/conditions under which the new system/equipment will be operated. The analysis should examine each function allocated to personnel and determine what operator or support personnel tasks are involved in the performance of each function.

b. The results of the failure modes, effects, and criticality analysis (FMECA), or equivalent analysis, should be analyzed to identify and document corrective maintenance task requirements. The FMECA or equivalent, should be documented on system/equipment hardware and software and to the indenture level consistent with the design progression and as specified by the requiring authority. The LPD, or equivalent format approved by the requiring authority, should be used for the FMECA documentation.

c. Preventive maintenance task requirements should be identified by conducting a reliability centered maintenance (RCM) analysis in accordance with the detailed guidelines provided by the requiring authority. The RCM analysis should be based on the FMECA data and documented in the LPD or equivalent format approved by the requiring authority.

5.7.2.11 Activity C.1.10, Design Alternatives.

Participate actively in the process of formulating and proposing design alternatives to address and correct design deficiencies identified during the analysis of functional requirements or the development of operations and maintenance tasks. This activity ensures that any discovered issues, inefficiencies, or potential failure points in the design are addressed early in the development cycle. Design alternatives that aim to reduce complexity, improve functionality, or enhance system performance should be explored and carefully evaluated. Ultimately, the goal of this activity is to ensure that design deficiencies are not only resolved but are done so in a way that improves the overall product life cycle and sustainment.

5.7.2.12 Activity C.1.11, Function Updates.

These functions should be updated as the system/equipment becomes better defined and data is more readily available.

5.7.2.13 Additional Information.

The paragraphs below contain useful information regarding this activity and sub-activities.

5.7.2.13.1 Iterations.

The activities contained in this section are highly iterative in nature and are applicable in each phase of the life cycle. Additionally, they are generally performed in sequence, that is, functions are identified (Activity C.1), alternatives are developed to satisfy the functions (Activity C.2), and evaluations and tradeoffs are conducted (Activity C.3). This process is then iterated to increasingly lower 1evels of indenture and detail in the classic system engineering manner.

5.7.2.13.2 Timing.

The identification of functions, development of alternatives, and tradeoff analyses should be conducted to a level of detail and at a time consistent with the design and operational concept development. The determination of level of detail required should be made in coordination with representatives from the engineering/functional specialties which will utilize the resulting data. In the early phases of the life cycle, functions and alternatives should only be developed to the level required to analyze differences and conduct tradeoffs. More detail can be developed after tradeoffs are made and the range of alternatives is narrowed. At the same time, the support plan should be finalized at a time which allows for the development and testing of the necessary IPS element resources to carry out the support plan.

5.7.3 Activity C.2, Support System Alternatives.

Identifying support alternatives should focus on the supportability, cost, and readiness factors of each alternative system. Support alternatives should address the 12 IPS elements and be able to support all functional requirements for support systems. After the initial analysis, systems that are still determined to be competitive should have a more thorough analysis of alternatives to include a tradeoff analysis. Conducting deeper level analyses on subsequent comparisons is designed to make efficient use of time and resources, minimizing resources spent analyzing support systems determined to not be the best fit throughout the analysis

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process. These more detailed analyses will expand to cover a detailed support plan covering all levels of maintenance, all items of hardware and software requiring support, and all operations and maintenance activities. Where applicable, depot maintenance inter-servicing considerations should be included in alternative support concepts. DoDI 4151.20 provides specific guidance for determining core depot-level maintenance requirements, by work breakdown structure, expressed in direct labor hours. Alternative support plans should be developed as support alternatives are formulated and should be updated as tradeoffs are conducted. SAE TA-STD-0017-A states that existing support infrastructure should be evaluated to maximize standardization and interoperability, reduce costs, and minimize logistics footprint. When existing infrastructure is considered, also consider the impact of using that infrastructure on other existing or planned products or systems.

A Preparation and Evaluation of Alternatives Activity Group may be created to optimize the support system and develop a solution that achieves the best balance between life cycle costs, schedule, performance, and supportability. This Activity Group is used for the identification and evaluation of the alternatives for design and support of the product. This Activity Group is comprised of the following activities: Functional Requirements, Support System Alternatives, and Evaluation of Alternatives and Tradeoff Analysis.

5.7.3.1 Overview.

During performance of this activity, viable support system alternatives for the new product for evaluation and tradeoff analysis will be identified and evaluated.

5.7.3.1.1 Purpose.

To determine the best support system for the product through iterative evaluations of alternative support systems. Iterative evaluations will include a tradeoff analysis and expand to a detailed support plan with the best alternative.

5.7.3.1.2 Required for.

These alternative support system concepts/plans and associated risks (Activity C.2.5) are addressed in the CDD. As tradeoffs are made, support system alternatives are refined, updated, and included in the CDD. Failure to accomplish this activity may result in a support structure that is less than optimum and may preclude achievement of the performance requirements for the equipment.

5.7.3.1.3 When Required.

Those activities which establish support system alternatives and risks are required prior to and during MSA. Activities which provide for alternative support plans and updates are generally applicable in EMD.

5.7.3.1.4 Applicable LPD Summaries.

LSA-008, LSA-011, LSA-012, LSA-013, LSA-014, LSA-024, LSA-025, LSA-026, LSA-037, LSA-070, LSA-071, LSA-072, LSA-074, LSA-075, LSA-076, and LSA-077.

5.7.3.1.5 Associated Standards.

SAE TA-STD-0017A

5.7.3.1.6 Associated Products.

Alternative Support Concepts, Updated Alternative Support Concepts, Alternative Support Plans, Updated Alternative Support Plans, Risk.

5.7.3.1.7 Responsibility.

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The government is responsible for Activity C.2 prior to and during MSA. The contractor is responsible for performing and updating this activity during TMRR and subsequent phases with the government retaining overall responsibility.

5.7.3.1.8 LPD Documentation.

SAE GEIA-STD-0007 entities impacted are Operations and Maintenance (A Entities), Reliability Requirements and Analysis (B Entities), Task Analysis (C Entities), Support Equipment Requirements (E Entities), Facility Requirements (F Entities), Skill and Training Requirements (G Entities), Unit Under Test Requirements (U Entities), Provisioning and Cataloging Requirements (H Entities), and Cross Functional Requirements (X Entities).

5.7.3.2 Activity C.2.1, Alternative Support Concepts.

Develop viable alternative support concepts for the new product considering the hardware, software, and operational scenario development. Alternative support systems should consider each individual IPS element and how they interact such as manpower, facilities, and training. Considering a virtual or local training options may provide cost savings over more centralized training or heavy use of instructor travel. Support alternatives may combine individual options in different combinations when all IPS elements are considered together.

5.7.3.3 Activity C.2.2, Support Concept Updates.

Update the alternative support concepts as product tradeoffs are conducted and new product alternatives become more clearly defined. Alternative support concepts should be documented and will address the supportability, cost, and readiness drivers, and unique functional requirements of the new product. The analysis of product support alternatives includes both financial and nonfinancial considerations, and qualitative and quantitative elements. The analysis may also include evaluation of performance, reliability, availability, maintainability, and supportability. Programs may place different weights on cost, benefits, and risks in the use of these factors in their decision. Assigning numerical weights based on the relative importance of cost, benefits, and risk is one way the program can better shape the analysis to support its decision making. The PSM Integrated Product Teams (IPTs) ability to effectively perform this analysis is greatly enhanced when a cost estimating subject matter expert is on the team.

5.7.3.4 Activity C.2.3, Alternative Support Plans.

Each alternative should be evaluated to equivalent levels of detail for that iteration of the evaluation and to the highest level of detail as described in the support concept. Support alternatives should factor in existing infrastructure as well as creative and innovative solutions, leveraging both new technologies and processes.

5.7.3.5 Activity C.2.4, Support Plan Updates.

Update and refine the alternative support plans as tradeoffs are conducted and the new product's design and operational scenarios become better defined.

5.7.3.6 Activity C.2.5, Support Plan Risks.

Identify risks associated with each support alternative in terms of cost, performance, schedule, and impact to the other elements of PS.

5.7.3.7 Additional Information.

The paragraph below contains useful information regarding this activity and sub-activities.

5.7.3.7.1 Tradeoff Analysis.

Also called a Business Case Analysis (BCA), a tradeoff analysis formulates support alternatives and may be an inherent feature of models used in the evaluation and tradeoff process. This is especially true for many repair level analysis models used during EMD phase where repair versus discard alternatives and alternative maintenance levels for repair and discard are automatically formulated and analyzed during execution of the

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model. Specifying the use of a specific model should ensure that the model can accommodate all the support alternatives required by Support System Alternatives activity. During tradeoff analysis, any significant risks from each of the support alternatives should be documented. Both qualitative and quantitative criteria for supportability, cost, environmental impact, and readiness requirements should be used during tradeoff analysis to determine the best results. DMSMS, obsolescence, testing options, energy source(s), survivability (damage/repair), and transportability are concerns to address for existing and potential support systems.

5.7.4 Activity C.3, Evaluation of Alternatives and Tradeoff Analysis.

Tradeoff analysis between design, operational, and support alternatives is an inherent part of system development. Optimum benefits are realized when these analyses are conducted considering all system factors (cost, schedule, performance, and supportability) before the system is finalized. The nature of the tradeoff models and techniques used and the magnitude, scope, and level of detail of the analysis will depend upon both the acquisition phase and the system complexity. Tradeoffs early in the program will generally be interdisciplinary and broad in scope. As development progresses, tradeoffs are progressively refined, inputs become more specific, and outputs influence a smaller number of related parameters.

5.7.4.1 Overview.

This task is performed to determine the preferred support system alternative(s) for each product alternative and to participate in alternative product tradeoffs to determine the best approach (support, design, and operation) which satisfies the need with the best balance between cost, schedule, performance, readiness, and supportability.

5.7.4.1.1 Purpose.

To determine the preferred support system alternative(s) for each system/equipment and to participate in alternative system tradeoffs to determine the best approach (support, design, and operation) which satisfies the need with the best balance between cost, schedule, performance, readiness, and supportability.

5.7.4.1.2 Required for.

Logistics influence on design is achieved by including early tradeoff analysis results in requirement documents such as the CDD and program documents such as the LCSP and SEP. Results of later tradeoff analyses are incorporated into the CDD update. Failure to accomplish this activity may result in a support structure that is less than optimum and may preclude achievement of the performance requirements for the equipment.

5.7.4.1.3 When Required.

Activity C.3 is generally initiated during MSA. Both system and support system tradeoffs continue to be iterated through EMD; other key tradeoffs are only selectively applied during EMD.

5.7.4.1.4 Applicable LPD Summaries.

LSA-011, LSA-012, LSA-013, LSA-014, LSA-024, LSA-025, LSA-026, LSA-036, LSA-037, LSA-040, LSA-046, LSA-070, LSA-071, LSA-072, LSA-074, LSA-075, LSA-076, LSA-077, LSA-078, and LSA-085.

5.7.4.1.5 Associated Standards.

SAE TA-STD-0017A, SAE TA-HB-0007-1A, MIL-HDBK-1390, SAE AS1390A, DoDD 5000.01, AR 700-127

5.7.4.1.6 Associated Products.

LORA Report, SMR Codes, Task Codes, and Updated Maintenance Concept.

5.7.4.1.7 Responsibility.

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The government is responsible for Activity C.3 prior to and during MSA. The contractor is responsible for performing and updating this activity during TMRR and subsequent phases with the government retaining overall responsibility.

5.7.4.1.8 LPD Documentation.

Task Analysis (C Entities), Support Equipment Requirements (E Entities), Facility Requirements (F Entities), Skill and Training Requirements (G Entities), Unit Under Test Requirements (U Entities), Provisioning and Cataloging Requirements (H Entities), Transportability (J Entities), Hazardous Materials Identification (S Entities), and Cross Functional Requirements (X Entities).

5.7.4.2 Activity C.3.1, Tradeoff Criteria.

Identify the qualitative and quantitative criteria which will be used to determine the best results. These criteria should be related to the supportability, cost, environmental impact, and readiness requirements for the system/equipment. Select or construct analytical relationships or models between supportability, design, and operational parameters and those parameters identified for the evaluation criteria. In many cases, the same model or relationship may be appropriate to perform a number of evaluations and tradeoffs. Conduct the tradeoff or evaluation using the established relationships and select the best alternatives based upon the established criteria. Include both peacetime and wartime considerations in the analyses. Assess the impact on existing or planned weapon, supply, maintenance, and transportation systems/equipment based on the tradeoff decision.

5.7.4.3 Activity C.3.2, Support System Tradeoffs.

Conduct evaluations and tradeoffs between the support system alternatives identified for each product alternative and recommend alternatives for each product. For the selected support system alternative(s), identify and document any new or critical product support resource requirements. Any restructured personnel job classification should be identified as a new resource.

5.7.4.4 Activity C.3.3, Sensitivity of Support Tradeoffs.

Conduct evaluations and tradeoffs between design, operations, and support concepts under consideration. Evaluate the sensitivity of system readiness parameters to variations in key design and support parameters such as R&M, spares budgets, resupply time, and manpower and personnel skill availability.

5.7.4.5 Activity C.3.4, Manpower/Personnel/Training Tradeoffs.

Estimate and evaluate the manpower and personnel implications of alternative system/equipment concepts in terms of total numbers of personnel required, job classifications, skill levels, and experience required. This analysis should include organizational overhead requirements, error rates, and training requirements.

5.7.4.6 Activity C.3.5, Job/Duty Tradeoffs.

Conduct evaluations and tradeoffs between design, operations, training, and personnel job/duty. This evaluation determines the optimum solution for attaining and maintaining the required proficiency of operating and support personnel. Training evaluations and trades should be conducted, and should consider the shifting of job duties between job classifications, the use of alternative technical publications concepts, and the use of alternative mixes of training modes (e.g., formal training, on-the-job training, unit training, training simulators, etc.)

5.7.4.7 Activity C.3.6, Level of Repair Analysis.

Conduct a LORA commensurate with the level of design, operation, and support data available. Identify characteristics from the LORA for those items identified on the candidates list per the guidance in SAE AS1390. Such characteristics should include source of supply, level of maintenance, disposition of unserviceable items, unit cost, and reliability. This analysis includes conducting sensitivity analysis on selected input parameters to assess the impacts on the baseline maintenance concept. The LORA process involves systematic and comprehensive evaluations conducted on an iterative basis throughout the life cycle of the system/equipment. Through the iterative evaluation process, a maintenance and support concept for the

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system/equipment, which is effective, yet economical, can be established. The process should integrate design, operations, performance, cost, readiness, and product support characteristics to assist in identifying and refining the maintenance and support concept for the system. Identify Source, Maintenance, and Recoverability (SMR) characteristics from the LORA for those items identified as provisioned item candidates.

5.7.4.8 Activity C.3.7, Diagnostics Tradeoffs.

Evaluate alternative diagnostic concepts to include varying degrees of Built-In-Test (BIT), off-line-test, manual testing, automatic testing, fault location, and Prognostics & Health Management (PHM). Identify the optimum diagnostic concept for each product alternative under consideration.

5.7.4.9 Activity C.3.8, BCS/New Product Tradeoffs.

BCS/New Product Tradeoffs: Conduct comparative evaluations between the supportability, cost, and readiness parameters of the new product and existing comparative products. Assess the risks involved in achieving the supportability, cost, and readiness objectives for the new product based upon the degree of growth over existing products.

5.7.4.10 Activity C.3.9, Energy Tradeoffs.

Conduct tradeoff evaluations between product alternatives and energy requirements. Evaluations should consider use of renewable energy sources when feasible. Identify the Petroleum, Oil, and Lubricants (POL) requirements for each product alternative under consideration and conduct sensitivity analyses on POL costs.

5.7.4.11 Activity C.3.10, Damage/Repair Tradeoffs.

Conduct tradeoff evaluations between product alternatives and their survivability, battle damage, and repair characteristics in a combat environment.

5.7.4.12 Activity C.3.11, Transportability Tradeoffs.

Conduct tradeoff evaluations between product alternatives and transportability requirements. Identify the transportability requirements for each alternative under consideration and the limiting constraints, characteristics, and environments associated with each of the modes of transportation. Example limitations include special packaging/container requirements, restrictions and/or limitations of transportation modes regarding weight and cube, hazardous cargo, and requirements for materials handling equipment.

5.7.4.13 Activity C.3.12, Facility Tradeoffs.

Identify the facility requirements for each support system alternative under consideration and the limiting constraints, characteristics, and environment on each type of facility. Conduct tradeoff evaluations between product alternatives and their support facilities requirements (e.g., including power, other utilities, and paving requirements).

5.7.4.14 Additional Information.

The paragraphs below contain useful information regarding this activity and sub-activities.

5.7.4.14.1 General Requirements for Evaluation and Tradeoff Analysis.

Activity C.3.1 provides the general requirements for each evaluation and tradeoff performed under Activity C.3. Activity C.3.2 continues support requirements throughout a system/equipment's life cycle to analyze alternative support approaches and alternative design, operations, and support approaches, respectively. The remaining activities represent key tradeoffs and evaluations that are frequently applicable during given phases of the life cycle. For a given acquisition program, the range of potential tradeoffs and evaluations is essentially limitless. Procedures should be established between the requiring authority and performing activity to allow for specific evaluations and tradeoffs to be identified and conducted as required throughout the acquisition process. In selecting and conducting tradeoffs and evaluations for a given acquisition program, the following factors should be considered:

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a. Corrosion prevention and mitigation factors should be considered when conducting tradeoff evaluations as directed by DoDD 5000.01. For more information on corrosion prevention see the Corrosion Prevention and Control Planning Guidebook for Military Systems and Equipment.

b. Sensitivity of support tradeoffs (Activity C.3.3) should always be considered a high priority.

c. Select the tradeoff activities which deal with the supportability, cost, and readiness drivers of the system (Activity C.3.8). Additionally, the scope of the selected tradeoff and evaluation activities can be limited to the drivers. Consider energy tradeoffs (Activity C.3.9), damage/repair tradeoffs (Activity C.3.10), transportability tradeoffs (Activity C.3.11), and facility tradeoffs (Activity C.3.12) when selecting tradeoff activities.

d. Some tradeoffs and evaluations lend themselves to being performed by a specific community for input into the PSA program. For example, the Diagnostics Tradeoffs (Activity C.3.7) may best be performed under the Maintainability Program, and the Training Tradeoffs (Activity C.3.5) may best be performed by training specialists, etc.

e. Care should be exercised in using man-hours as a criteria parameter for manpower trades (Activity C.3.4) because of two factors. First, each integral number of people has a range of man-hours associated with it. Adding or reducing man-hours has no effect on the number of people required until either the upper or lower limit of the range is breached. Then, and only then, does the number of people required change. Second, there is no direct correlation between man-hours and number of people required unless personnel skills are considered. For example, the same number of man-hours may equate to one person required or many people required depending on the number of different skills required.

f. A key element of PSA is determining the most effective and efficient echelon to perform maintenance on systems. Activity C.3.6 addresses this need through establishing corrective maintenance requirements for a system based on economic constraints, non-economic constraints, operational readiness requirements, and pertinent reliability and maintainability parameters. Conducting a LORA ensures that operational readiness is achieved throughout a system's life cycle in an optimal, least cost fashion. Starting the LORA process early in a system's development, and continuous evaluation throughout its life cycle, can ensure a LORA influences the system's design and the maintenance planning by producing an effective support solution. For detailed guidance related to LORA, refer to SAE AS1390A, and MIL-HDBK-1390.

g. Where applicable (e.g., in doing contractor versus organic support alternatives), ensure that realistic personnel costs are used. Often Service published personnel costs do not include costs associated with recruitment, washouts, retention, etc., and use of these personnel costs may bias the tradeoff results.

5.7.4.14.2 Cost Effectiveness Analysis.

An excellent tool to assist in the performance of the evaluation and tradeoff analysis is to perform a Cost Effectiveness Analysis. OMB Circular A-94 can be used to fulfill the need and standardize the process to conduct analyses of costs, benefits, and risks.

5.8 Activity Group D, Determination of Product Support Resource Requirements.

The Determination of Product Support Resource Requirements identifies the resource demands of the product in its intended environment. This activity produces a list of preventive and corrective maintenance tasks, identifies specific resource requirements, identifies number of personnel, and skills needed to perform maintenance tasks. In addition, this activity accesses supply support, transportation, and risk reduction requirements. Product support resource requirements associated with proposed system/equipment alternatives should be identified and refined as the system/equipment progresses through its development. The extent of identification depends upon the magnitude and complexity of the new system/equipment and the phase of the acquisition cycle. As development progresses and the basic design and operational characteristics are established, this determination becomes a process of analyzing specific design and operational data to more completely identify detailed product support resource requirements. This portion of the PSA defines the requirements of the principal elements of IPS. This analysis can be very costly and involve development of a

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considerable amount of documentation. In determining the timing and scope of analysis activities in this section, the following should be considered:

a. Early identification of product support resource requirements should be limited to new or critical requirements so that available resources are effectively used, and sufficient acquisition time is allocated to the development and testing of these requirements. This identification should be accomplished as part of Activity C.3.2 & Activity B.4.

b. Resource requirements for different system alternatives should only be identified to the level required for evaluation and tradeoff of the alternatives.

c. Product support resource requirements should be identified in a time frame which considers the schedule for developing the required documentation for each element of IPS. Schedule the accomplishment of these activities considering the time required to provision, develop technical manuals, establish training programs, etc.

d. There are different levels of documentation that can be applied to the identification of product support resource requirements. (For example, supply support requirements can be identified through documentation of only a few data elements early in a program while later the total range of data elements required to accomplish initial provisioning can be documented.)

e. Detailed input data for identification of product support resource requirements is generated by many system engineering functions. Therefore, analysis, documentation requirements, and timing should be a coordinated effort between the PSA program and other system engineering processes to avoid duplication of effort and ensure timely availability of required input data.

f. Validate the key information documented in the LPD through performance of operations and maintenance tasks on prototype equipment. This validation should be conducted using the procedures and resources identified during the performance of D.1.1 and updates should be made where required. Validation requirements should be coordinated with other system engineering demonstrations and tests (e.g., maintainability demonstrations, reliability and durability tests) to optimize validation time and requirements.

g. Identification of HSI impacts, such as on manpower, personnel, human factors, training, or habitability are key components when looking at maintenance actions.

Also, this activity is designed to ensure an effective fielding of the new system/equipment with all required resources. This impact determination is necessary for the acquisition decision process to result in improved overall force capability and to ensure planning to accommodate the new system/equipment effectively.

5.8.1 General Considerations.

The activities in this section are designed to identify parts, tools, manpower, transportation, facilities, and support equipment for the operation and maintenance of the system. This activity also looks at how it impacts the operation and maintenance when the system is fielded. It ensures that newly fielded equipment can be sustained through the early phases of combat operation by planning, programming, budgeting, and executing.

5.8.2 Activity D.1, Task Analysis.

The timing and depth for performance of Activity D.1 is governed by the level of design, operation definition, and by the program schedule. The analysis can be performed in a cost-effective manner when the required input information from the design activity is available. This analysis should not be delayed beyond a point that inhibits conducting of the activity analysis and use the results to develop IPS element documentation (e.g., technical manuals, personnel requirements list, etc.) in a timely manner. TMRR phase efforts should be limited to only essential information. During EMD this activity would be performed for all system/equipment components and during any phase in response to design changes (refer to Activity E.4.2).

5.8.2.1 Overview.

Product support resource requirements associated with new system/equipment alternatives should be identified and refined as the system/equipment progresses through its development. The extent of identification depends upon the magnitude and complexity of the new system/equipment and the phase of the acquisition cycle.

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5.8.2.1.1 Purpose.

To analyze required operations, maintenance, and support tasks to: identify resources required for each task; highlight resource requirements which are new or critical (Activity D.1.3) and any risks associated with those resource requirements (Activity D.1.6), including hazardous materials/waste and their environmental impact; define transportability requirements (Activity D.1.7); identify support requirements exceeding established goals/thresholds/constraints; provide data supporting recommended design alternatives to improve supportability/enhance readiness (Activity D.1.5); and provide source data to develop required documents, e.g., Maintenance Plans, Maintenance Allocation Charts, Technical Manuals, Provisioning documentation, etc.

5.8.2.1.2 Required for.

Task analysis, when properly interfaced with system engineering disciplines and other IPS functional element inputs, effectively integrates/translates these inputs into IPS documentation output products. Failure to accomplish this activity may result in little or no documentation of the required maintenance and support procedures required to sustain the equipment. For a contractor logistics support strategy, failure to acquire the support products may significantly impact the ability to establish alternate sources for support during the life of the equipment leading to higher life cycle costs.

5.8.2.1.3 When Required.

The overall program schedule, level of design, and operation definition govern the timing and scope of the task analysis. The period during which performance of this task can be cost effective is limited. It begins with availability of required input from design activities and extends only to that point which allows time for analysis results to be used to develop IPS documents and acquire the identified support resources. Selective use of this activity during TMRR should be limited to identification/documentation of new/critical resources. Activity D.1 is generally applicable during EMD.

5.8.2.1.4 Applicable LPD Summaries.

LSA-001, LSA-003, LSA-004, LSA-005, LSA-006, LSA-007, LSA-008, LSA-009, LSA-010, LSA- 011, LSA-012, LSA-013, LSA-014, LSA-016, LSA-018, LSA-019, LSA-020, LSA-021, LSA-022, LSA-023, LSA-024, LSA-025, LSA-026, LSA-027, LSA-030, LSA-032, LSA-033, LSA-036, LSA- 037, LSA-039, LSA-040, LSA-046, LSA-050, LSA-051, LSA-055, LSA-056, LSA-065, LSA-068, LSA-070, LSA-071, LSA-072, LSA-074, LSA-075, LSA-076, LSA-077, LSA-078, LSA-080, LSA-085, LSA-126, LSA-151, LSA-152, LSA-154, and LSA-155.

5.8.2.1.5 Associated Standards.

SAE TA-STD-0017A, SAE GEIA STD-0007C, and SAE TA-HB-0007-1A.

5.8.2.1.6 Associated Products.

Provisioning Files (LSA-036) imported into LMP, D220, Immersive Commercial Acquisition Programs (ICAPs); Training Need Requirements; Maintenance Allocation Chart (MAC); RPSTL; Additional Authorization Lists; PMCS, and Provisioning Bill of Materials.

5.8.2.1.7 Responsibility.

The contractor is responsible for task analysis during TMRR and EMD as applicable with the government retaining overall responsibility.

5.8.2.1.8 LPD Documentation.

All SAE GEIA-STD-0007 entities are impacted (depending on the service specific requirements) except for the A Entities. Draft options should be used for those reports that have draft options until the end of EMD

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phase. At that time data development should be near completion and proof reports should be developed. The data should continue to be updated as better information becomes available (Activity D.1.10).

5.8.2.2 Activity D.1.1, Conduct Task Analysis.

Activity D.1.1 provides the detailed identification of requirements conducted during the task analysis for all elements of IPS to operate and support the new system/equipment. This analysis will provide details of each operation, maintenance and support task contained in the task inventory (Activity C.1.9). It also includes an analysis of requirements to identify areas where supportability enhancements can be achieved. During performance of this activity, the following will be determined for each operation and maintenance activity:

a. Product support resources required (considering all IPS elements) to perform the task. Identify the system/equipment hardware and software with which this analysis will be performed. Breakdown the system, usually follows the WBS for the initial indenture levels, or use a Reliability Block Diagram for the breakdown of the system or create a LCN structure to Identify the indenture levels for which this analysis will be performed.

b. Task frequency, task interval, elapsed time, and manhours in the system/equipment's intended operational environment and based on the specified annual operating requirement. Number of personnel, skill levels, skill specialties, man-hours, and elapsed time. This information helps identify future training needs for maintenance to be done optimally. Interval for and the frequency of activity performance in the intended operational environment. The annual operating basis for activity frequencies should be identified. Understanding both the Annual operating requirement and the task frequency of the item under analysis will identify how often a maintenance should be done, provide a basis for parts consumed, and the manpower needed.

c. Maintenance level assignment based on the established support plan (Activity C.3). Identification of appropriate maintenance levels, using the results of the LORA. The maintenance level tells the government where parts, tool, support equipment, facilitates, and personal are needed to keep the system at the highest readiness.

d. Environmental impact of the maintenance tasks including use of hazardous materials, generation of hazardous waste, and release of air and water pollutants.

e. Spares, repair parts, and consumables required. DoDI 4140.01, DoDM 4140.26-V1, and Joint Publication AMC-R 700-99, NAVSUPINST 4790.7, AFLCR 400-21, MCO P4410.22C provide guidance for initial supply requirements determination to achieve weapon system supply support. Packaging, handling, storage, and transportation requirements (PHS&T) are also identified during the task analysis.

f. System safety, reference MIL-STD-882, plays an important part in the task analysis. Identification of hazardous ergonomic tasks, physical, chemical, biological and other hazards can help prevent serious injury or death.

g. At the end of an item’s life cycle, it will have to be disposed of properly and safely.

Information from other activities can help with conducting of the task analysis; the information is normally available from the requiring authority such as:

a. Existing and planned personnel skills, capabilities, and programs of instruction.

b. Lists of standard support and test equipment.

c. Facilities available.

d. Training devices available.

e. Existing transportation systems and capabilities

f. Description of personnel capabilities (target audience) intended to operate and maintain the new system/equipment at each level of maintenance.

g. Drawings

5.8.2.3 Activity D.1.2, Document Task Analysis.

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Document the results of Activity D.1.1 in the LPD or equivalent format approved by the requiring authority. Identify the levels of maintenance which will be documented during performance of the maintenance task. Any supplemental documentation requirements over and above the LPD data (e.g., transportability clearance diagrams, and timelines). Deliver data items identified on the Attribute Selection Worksheet in SAE GEIA-STD-0007 Rev C, Appendix C.

5.8.2.4 Activity D.1.3, New/Critical Resources.

Identify new or critical logistic support resources required to perform each task, and hazardous materials, hazardous waste, and environmental impact requirements associated with these resources. New resources are those which require development to operate or maintain the new system/equipment. These can include support and test equipment, facilities, new or special transportation systems, new computer resources, and new repair, test., or inspection techniques or procedures to support new design plans or technology. Critical resources are those which are not new but require special management attention due to schedule constraints, cost implications, or known scarcities. Unless otherwise required, document new and modified logistic support resources in the LPD, or equivalent documentation approved by the requiring authority, to provide a description and justification for the resource requirement. Identify projected logistic support resource shortages.

5.8.2.5 Activity D.1.4, Training and Performance Support Requirements.

Based upon the identified task procedures and personnel assignments, identify training requirements and provide recommendations concerning the best mode of training (formal classroom, on-the-job, or both) and the rationale for the recommendations. For embedded training, identify the knowledge, skills, abilities and tasks for the personnel to operate, maintain and support the system. This training can be completed live, virtual, constructive-training environment as indicated in DODD 1322.18 Military Training. Document the results in the LPD or equivalent format approved by the requiring authority.

5.8.2.6 Activity D.1.5, Design Influence.

Provide data supporting recommended design alternatives to improve supportability/enhance readiness. Analyze the total logistic support resource requirements for each task and determine which tasks fail to meet established supportability or supportability related design goals or constraints for the new system/equipment. Identify tasks which can be optimized or simplified to reduce O&S costs, optimize logistic support resource requirements, reduce environmental impact including use of hazardous materials, generation of hazardous waste, release of air and water pollutants, and environmental impact, or enhance readiness. Propose alternative designs and participate in the development of alternative approaches to optimize and simplify tasks or to bring task requirements within acceptable levels.

5.8.2.7 Activity D.1.6, Risk Reduction.

Reduce any risks identified during the task analysis. If the risk cannot be reduced then make sure to document that Risk, which will allow the Requiring Authority to act upon it. Based upon the identified new or critical logistic support resources, determine what management actions can be taken to minimize the risks associated with each new or critical resource. These actions could include development of detailed tracking procedures, or schedule and budget modifications. Managers and program decision authorities should consider the desirability and effectiveness of integrating Spares Acquisition Integrated with Production (SAIP) when the end item is, or will be, in production.

5.8.2.8 Activity D.1.7, Transportability Analysis.

Conduct a transportability analysis on the system/equipment and any sections thereof when sectionalization is required for transport. When the general requirements of MIL-STD-1366 limitations are exceeded, document the transportability engineering characteristics in the LPD, or equivalent format approved by the requiring authority. Participate in the development of design alternatives when transportability problem areas are surfaced.

5.8.2.9 Activity D.1.8, Supply Support.

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For those support resources requiring initial provisioning, document the provisioning technical documentation (PTD) in the LPD, or equivalent format approved by the requiring authority. The development and maintenance of the PTD should be scheduled to ensure availability of information for tasks such as LORA, Life Cycle Cost (LCC) analysis, and the delivery of PTD and associated Engineering Data for Provisioning (EDFP) requirements as spelled out in the SOW and contract CDRLs. The PTD contained in the LPD should include all required documentation and top down/breakdown visibility for assemblies, subassemblies and piece components for the system being provisioned.

5.8.2.10 Activity D.1.9, Logistics Products.

Validate the key information documented in the LPD through performance of operations and maintenance tasks on prototype equipment. This validation should be conducted using the procedures and resources identified during the performance of D.1.1 and updates should be made where required. Validation requirements should be coordinated with other system engineering demonstrations and tests (e.g., maintainability demonstrations, reliability and durability tests) to optimize validation time and requirements. Prepare output summaries to satisfy IPS documentation requirements as specified by the requiring authority. These should include all, pertinent data contained in the LPD at the time of preparation.

5.8.2.11 Activity D.1.10, Task Analysis Update.

Update the data in the LPD as better information becomes available and as applicable input data from other system engineering programs is updated. Following delivery and acceptance of the initial provisioning data, the performing activity should notify the requiring authority of approved changes to the provisioning data via design change notices (DCN) with supporting technical data package, MIL-STD-31000.

5.8.2.12 Activity D.1.11, Parts Screening.

Identify provisioning and other pre-procurement data to be submitted for government screening in order to facilitate support system standardization, pre-provisioning screening, and item entry control reviews.

5.8.2.13 Activity D.1.12, Environment, Safety, and Occupational Health (ESOH) Analysis.

Document ESOH in the LPD and should including hazardous materials/waste and their environmental impact. Information to include:

a. Hazardous materials inherent in the design of the item.

b. Hazardous materials required for operations and support of the item,

c. Hazardous waste generated in the operation and support of the item,

d. Air and water pollutants released during the operation of the item,

e. Hazardous maintenance procedure codes associated with the maintenance of the item,

f. Warnings, cautions, and notes identifying critical instructions to be followed during maintenance procedures associated with the item,

g. Hazardous materials storage, hazardous waste storage and disposal costs for items having non-routine or significant (i.e., serious or high ESOH risk) handling and disposal costs, and

h. Environmental compliance certification information [i.e., Restriction of Hazardous Substances (RoHS); Registration, Evaluation, Authorization and Restriction of Chemicals (REACH); European Conformity (CE) Marking] for the item.

5.8.2.14 Additional Information.

The paragraphs below contain useful information regarding this activity and sub-activities.

5.8.2.14.1 Task Analysis Tailoring.

This activity can be tailored to cost effectively meet program needs through identification of system hardware and software on which the analysis will be performed, identification of indenture level to which the analysis

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will be carried, identification of the maintenance levels that will be included in the analysis, and the identification of the range of documentation required. This tailoring process should be done in conjunction with other system engineering programs and should consider the requirements of each IPS functional element. The system/equipment maintenance should be considered during task analysis activity.

5.8.2.14.2 Importance of Task Analysis.

Task analysis is the area of a PSA program which requires the most coordination and interfacing. It involves essentially every system engineering discipline and IPS functional element manager. When properly interfaced, task analysis provides a cost-effective means for ensuring supportability of the system/equipment and developing an integrated support system for the system/equipment. When not properly interfaced, activity analysis can be a very costly process which duplicates other analyses and generates incompatible IPS products. Design, reliability, maintainability, HSI, PHS&T, and ESOH are all involved in satisfying the activity analysis requirements of Activity D.1. The PSA program integrates and translates these inputs into output products required for preparation of IPS documents.

5.8.2.14.3 Task Analysis and IPS Elements.

The timing and depth for performance of Activity D.1 is governed by the level of design, operation definition, and by the program schedule. The analysis can be performed in a cost-effective manner when required input information from the design activity is available. This analysis should not be delayed beyond a point that does not allow for sufficient time to conduct the activity analysis and use the results to develop IPS element documentation (e.g., technical manuals, personnel requirements list, etc.) in a timely manner. TMRR phase efforts should be limited to only essential information. During EMD this activity would be performed for all system/equipment components and during any phase in response to design changes (refer to Activity E.4.2).

5.8.3 Activity D.2, Early Distribution and Fielding Analysis.

This activity is designed to ensure an effective fielding of the new system/equipment with all required resources. Activity D.2.1 is designed to quantify the effect on existing systems from the new system/equipment's deployment. This impact determination is necessary for the acquisition decision process to result in improved overall force capability and to ensure planning to accommodate the new system/equipment effectively. Activity D.2.2 specifically addresses the manpower and personnel impact of the deployment. This Activity identifies where the necessary people and skills will come from for the new system/equipment, and what impact will be felt from this on other systems. Activity D.2.3 identifies the effect on system readiness for varying levels of product support resources. This analysis forms the quantitative basis for budget requirements. Activity D.2.4 identifies product support resource requirements in alternative operational environments and provides the basis for wartime reserve stocks and mobilization plans and requirements. Activity D.2.5 requires plans to be developed to alleviate any potential fielding problems for the new system/equipment. These activities should only be selectively applied to equipment level acquisitions.

5.8.3.1 Overview.

Early fielding analysis reviews the impact a newly fielded system has on existing fielded systems. Identification of these potential deployment issues is critical to the success of the system.

5.8.3.1.1 Purpose.

To assess new system impact on existing systems to include quantifying risk levels which surround system performance/supportability; to identify sources of manpower/personnel skills to meet new system requirements; to determine impact of failure to obtain necessary product support resource requirements.

5.8.3.1.2 Required for.

Ensure the new system is fielded with all required resources. Failure to accomplish this activity may result in fielding delays and the absence of required support. These shortfalls would then affect the performance of the equipment in the field.

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5.8.3.1.3 When Required.

The early fielding analysis is conducted during the EMD phase.

5.8.3.1.4 Applicable LPD Summaries.

LSA-007, LSA-014, LSA-023, LSA-024, LSA-025, LSA-026, LSA-036, LSA-058, and LSA-075.

5.8.3.1.5 Associated Standards.

SAE TA-STD-0017A, International Standards Organization (ISO) 55000

5.8.3.1.6 Associated Products.

Early Fielding Report, Materiel Fielding Plan, Manpower and Personnel Estimate, Supportability Analysis Report, Survivability Analysis Report, and Risk Assessment Report

5.8.3.1.7 Responsibility.

The contractor is responsible for ensuring early fielding analysis is performed during EMD. This analysis should be coordinated with the government, with the government retaining overall responsibility.

5.8.3.1.8 LPD Documentation.

Support Equipment Requirements (E Entities), Skill and Training Requirements (G Entities)

5.8.3.2 Activity D.2.1, System Impacts.

Examine the effects of introducing the new product on the current system. This analysis should include impacts on shop/depot workload and scheduling, such as whether additional shifts or overtime will be needed to handle increased maintenance demands. Consider provisioning and inventory factors, for example, whether new parts need to be stocked or if existing inventory levels are sufficient. Evaluate the availability and capability of automatic test equipment, determining if current testing setups can accommodate the new product or if upgrades are necessary. Assess human factors integration, like the need for additional training or ergonomic adjustments to workstations. Review POL (Petroleum, Oils, and Lubricants) and hazardous material requirements to ensure compliance with safety regulations when handling new materials. Investigate real property considerations, such as the need for expanded storage or workspace. Finally, analyze transportation systems to determine if current logistics can support the new product's distribution. This comprehensive assessment should also identify any required changes to support existing products considering these new requirements.

5.8.3.3 Activity D.2.2, Impacts on Manpower and Personnel.

Conduct a detailed analysis of current manpower and personnel sources within the military to determine where the necessary manpower for the new equipment will be sourced. This involves examining the availability and skill sets of existing personnel and identifying any gaps that may need to be filled through reassignments, training, or recruitment. For instance, if the new equipment requires specialized technical skills, assess whether current DoD Service members can utilize current skills with assistance of a technical manual or if specialized training will be required. Evaluate the impact on existing missions and operations from reallocating these personnel, such as potential delays or reduced effectiveness in other areas. This assessment should also consider the long-term sustainability of manpower resources, ensuring that the introduction of the new equipment does not lead to overextension or fatigue among soldiers.

5.8.3.4 Activity D.2.3, Readiness Impacts.

Thoroughly evaluate the potential impact on product readiness if the necessary support resources are not obtained. This includes conducting a risk assessment to understand how shortfalls in parts, tools, training, or other support elements could affect the product's deployment and maintenance. For example, if spare parts are

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not available, it could lead to longer downtimes and reduced operational readiness. The risk assessment should quantify these impacts, considering factors such as the likelihood of resource shortages and the severity of their effects on the product's performance. This analysis aids in prioritizing resource allocation and developing contingency plans to mitigate potential readiness issues.

5.8.3.5 Activity D.2.4, Survivability Analyses.

Perform comprehensive survivability analyses to determine how the product's support resource requirements change based on its use in the intended environment. This includes assessing susceptibility to threats, such as environmental hazards or enemy actions, and evaluating the product's vulnerability, or how easily it can be damaged or disrupted. Recoverability, or how quickly and effectively the product can be repaired and returned to service, is also a key component. For example, if the product is to be used in a combat zone, assess how it withstands impacts or electronic interference and how quickly it can be repaired under field conditions. Document the necessary support resources and any alternative sources that can meet these requirements, ensuring that the product remains operational and effective in its intended environment.

5.8.3.6 Activity D.2.5, Impact Solutions.

Develop comprehensive plans to address any problems identified in the assessments and analyses conducted in Activity D.2. This involves creating detailed action plans that outline steps to mitigate risks, allocate resources, and resolve identified issues. For instance, if a shortage of trained personnel is identified, the plan might include recruiting new staff, conducting targeted training programs, and implementing retention strategies. These solutions should be practical, cost-effective, and tailored to ensure the smooth integration and ongoing support of the new product. Regular reviews and updates to these plans are essential to adapt to changing circumstances and ensure continuous improvement in the product's supportability and readiness.

5.8.3.7 Additional Information.

None.

5.9 Activity Group E, Product Operational In-Service Support.

The Product Operational In-Service Support activity identifies support requirements during the operations and support phases of the system. This activity highlights issues of part obsolescence, field feedback reporting, counterfeit prevention, disposal requirements, and closed loop reporting analysis such as Failure Reporting Analysis and Corrective Action System (FRACAS) in the post deployment phase of the systems life cycle.

5.9.1 General Considerations.

The activities in this section are intended to ensure that operational support problems are identified and addressed. Re-procurement problems, closing of production lines, obsolescence of design, expected discontinuances of business by manufacturers, etc. in the operational environment cause problems in ensuring sufficient supply of spare and repair parts (Obsolescence and Diminishing Manufacturing Sources and Material Shortages (DMSMS)). If these factors are determined to present potential problems, plans should be established early to ensure that effective operational support will be available for the new system/equipment. Analysis of feedback data from the operational environment is necessary in verifying that the system/equipment has met its objectives and in evaluating the operational support. In some cases, this assessment can be made using field feedback data that is routinely available from standard supply and maintenance reporting systems; while in other cases, data from standard reporting systems should be supplemented to meet the verification objective within acceptable confidence levels. Any requirement for supplemental data should be weighed against the cost and resources to obtain the data and any impact upon using organizations to gather the data.

5.9.2 Activity E.1, DMSMS Management, Obsolescence Management, and Counterfeit Prevention.

Obsolescence and DMSMS analysis establish a process for identifying the loss, or impending loss, of manufacturers or suppliers of components, assemblies, sub-assemblies, piece parts and material required to operate and/or maintain the system/equipment. Original Equipment Manufacturer (OEM) components and assemblies are often the most cost-effective sources of continuing supply to support the system/end item.

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Likewise, alternate or substitute components and assemblies that meet the engineering requirements of the OEM may offer additional low-cost alternate sources of supply that ensure continuing support during operation of the system/end item. Absent these sources of supply an analysis of other alternatives should be conducted. Life of type buys that consider the useful life of the system/end item is the first step in this analysis process. Other alternatives include emulation, reverse engineering and minor/major redesign. Each of these alternatives is progressively more costly and requires significantly more lead time. The key to this activity is the early establishment of a DMSMS program plan that proactively monitors candidate components and assemblies via engineering bill of materials (EBOM) and analyzes the best method to mitigate the loss of sources of supply and creating a risk mitigation plan to counterfeit items. Establishment of a DMSMS program should be coordinated in conjunction with the requirements contained in SAE TA-STD-0016. SD-22 and SD-26 implement proactive DMSMS management programs which should be considered for accomplishing Activity E.1. For more information, refer to SAE GEB1, and DoDM 4245.15.

5.9.2.1 Overview.

To minimize the impact of DMSMS, agencies and organizations should be able to incorporate timely and cost-effective engineering practices during development, production, and sustainment.

5.9.2.1.1 Purpose.

To analyze the loss or impending loss of manufacturers or suppliers of parts and material required to operate and sustain the system/equipment and support development of a program to establish alternate sources of supply.

5.9.2.1.2 Required for.

To identify the obsolescence, loss, or impending loss, of manufacturers or suppliers of components, assemblies, sub-assemblies, piece parts and material required to operate and/or maintain the system/equipment. Establish strategies/alternate solutions for mitigating obsolescent parts and shortages. Failure to accomplish this activity may affect the performance of the equipment and affect the timely maintenance of the equipment due to shortages of parts or materials.

5.9.2.1.3 When Required.

Initiated in the TMRR phase when components and manufacturers of components are selected, and design can still be influenced to lessen or eliminate potential problems. The process is continued throughout the P&D and O&S phases.

5.9.2.1.4 Applicable LPD Summaries.

LSA-010, LSA-036, LSA-039, LSA-040, LSA-046.

5.9.2.1.5 Associated Standards.

SAE TA-STD-0017A, DoDM 4245.15-M, DoDI 4140.67, COMDTINST M4105.12 DMSMS Manual (Coast Guard), AFMCI20-105, SD-22, SD-26 DMSMS, AR 702-20, DA PAM 702-20, SAE TA-STD-0017A, SAE GEB1, SAE TA-STD-0016, SAE AS6174, SAE AS6081, SAE AS6140, SAE AS6171.

5.9.2.1.6 Associated Products.

DMSMS Management Plan (System Planning and Requirement Software (SYSPARS), DI-MGMT-81948, DI-MGMT-81948, DI-MGMT-82274.

5.9.2.1.7 Responsibility.

The government is responsible for ensuring that a DMSMS/obsolescence analysis is conducted, and a DMSMS/obsolescence program is established to ensure uninterrupted sources of supply.

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5.9.2.1.8 LPD Documentation.

Cross Functional Requirements (X Entities), Provisioning and Cataloging Requirements (H Entities), and Support Equipment Requirements (E Entities).

5.9.2.2 Activity E.1.1, DMSMS and Obsolescence Management.

To establish a process for DMSMS and obsolescence management, it is recommended to identify the loss, or imminent loss, of manufacturers or suppliers of parts, assemblies, subassemblies, piece parts, and material needed to run and/or maintain the product. The analysis should include, but is not limited to, the following topics:

a. How and where to get information from the customer about DMSMS and obsolescence issues.

b. The scheduled resolution of obsolescence and DMSMS problems.

c. Screening and monitoring of parts lists, including reducing the possibility of counterfeit components.

d. Handling alerts from the Government-Industry Data Exchange Program (GIDEP).

e. Predictive analysis and DMSMS and obsolescence problem solving.

f. Determining the resilient designs for DMSMS.

5.9.2.3 Activity E.1.2, Counterfeit Prevention.

Following the guidelines of SAE AS6174, apply preventive measures and early detection techniques to minimize the occurrence of counterfeit materials. Industry organizations should consistently deliver and enhance safe, reliable materials that comply with both customer and regulatory standards to ensure satisfaction. The globalization of industry, along with diverse regional and national expectations, has made this more challenging. End-product organizations should maintain the quality and integrity of materials sourced from global suppliers at all supply chain levels, while suppliers and processors should cater to the varying quality expectations and requirements of multiple customers.

a. Investigate, examine, and evaluate every instance of alleged counterfeit items. (e.g., parts screening, risk mitigation, DMSMS management, and obsolescence management).

b. Document all instances of suspected and verified counterfeit parts into the relevant reporting systems, such as the GIDEP.

c. As appropriate, update the LPD and other program documentation.

5.9.2.4 Additional Information.

None.

5.9.3 Activity E.2 Field Feedback.

A system's ultimate measure of supportability is determined by how well it performs in its operational environment. Field feedback data can provide a vital source to the analysis of how well the support structure is performing. Activity E.2 addresses the viability of existing feedback systems to provide the required data for analysis (Activity E.2.2) and the need to augment the existing feedback systems with additional data to measure the supportability of a system. Each of the DoD services has field feedback systems in place that provide operational data (e.g. fuel consumption, miles driven, flight hours, etc.), maintenance data (e.g. maintenance activities performed, elapsed time to perform, parts consumed, etc.), parts requisitioning data (e.g. demands), readiness data, design/quality issues data, prognostics and diagnostics data and interactive electronic manuals/technical publication issues data. Prior to fielding of a new system/equipment the existing field feedback system should be assessed to ensure that all the data needed to verify the support objectives are available. Additional field feedback data not currently being acquired but needed to analyze the support objectives would be a byproduct of this effort. Modification of the existing field feedback system versus the cost of the modification and impact on resources should be a part of the analysis to determine the cost effectiveness of acquiring the additional data. Field feedback data for systems/equipment that will be supported by the contractor as part of a Performance Based Agreement (PBA) strategy will likely limit the

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feedback data to the information required to ensure the objectives of the contract are being met. This could be accomplished by requiring a contractor to use the existing DoD service reporting system or through identification and delivery of specific data in contractor format. Each approach should be weighed against the cost to implement the data collection process and the return on investment.

5.9.3.1 Overview.

Field Feedback is an evaluation that compares the conditions prior to the implementation of the system/equipment with the actual results achieved by the system/equipment.

5.9.3.1.1 Purpose.

To correct potential field feedback support problems prior to closing production lines and to develop a plan to ensure effective support of the system during its life cycle. A field feedback support plan should identify single/dual source items and those for which the government has no data rights. Plans should include available organic support assets, production line buy-out, or contractor logistics support agreements.

5.9.3.1.2 Required for.

Plans should document identified problems (e.g. inadequate sources of supply/repair); analyze alternative solutions, their associated costs and risks; and outline estimated funding and actions required to implement the preferred solution(s). Failure to accomplish this activity in a comprehensive manner will affect the performance and safety of the equipment and the cost-effective maintenance of the equipment. Without the analysis of field feedback information, sound and cost-effective adjustments to the maintenance and support of the equipment may not be accomplished and may result in higher life cycle costs.

5.9.3.1.3 When Required.

This activity is performed during the P&D and O&S phases but recommend planning begin no later than EMD phase.

5.9.3.1.4 Applicable LPD Summaries.

None.

5.9.3.1.5 Associated Standards.

SAE TA-STD-0017A, MIL-HDBK-2155, AIAA S-102.1.4

5.9.3.1.6 Associated Products.

FRACAS, Field Service Reports (FSRs), and Maintenance Data Collection (MDC) systems.

5.9.3.1.7 Responsibility.

The postproduction support analysis is performed by the contractor during production. The government assesses and verifies the completeness of all activities accomplished by the contractor.

5.9.3.1.8 LPD Documentation.

None.

5.9.3.2 Activity E.2.1, Feedback Sources.

Feedback sources refer to the various channels or individuals from which feedback can originate. To gather accurate feedback data, consider factors such as environment, timing, failure classification, maintenance

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schedules, unbiased data collection, randomness, designated data collectors, data collection locations, required data volume, and optimal data collection timing.

5.9.3.3 Activity E.2.2, Feedback Analysis.

Feedback analysis involves the systematic collection, organization, and interpretation of reports/comments from military personnel regarding a product, service, or operational experience. This process is critical for maintaining and improving operational effectiveness, readiness, and the overall mission success of military units.

For example, after deploying a new piece of equipment or software in the field, soldiers and support staff provide detailed feedback through After-Action Reports (AARs), surveys, and debriefs. This feedback can cover various aspects, such as functionality, ease of use, reliability, and any encountered issues.

Feedback is gathered through structured channels like AARs, FSRs, and MDC systems. These inputs are then organized in databases to enable efficient analysis.

Analysts review and interpret this feedback to identify trends, recurring issues, and potential areas for improvement. For example, if multiple soldiers report difficulties with a specific piece of gear under certain conditions, this insight is flagged for further investigation and potential modification.

Examples of Application:

a. Surveys: Surveys can be distributed post-deployment to gather comprehensive data on the performance and usability of new gear.

b. Reviews: Field commanders and unit leaders provide formal reviews highlighting operational effectiveness and logistical challenges faced during missions.

c. Warfighter Support Conversations: Direct communications between end-users (soldiers, maintenance crews) and support teams are documented to capture real-time problem-solving and user experience.

By systematically analyzing this feedback, the Army can make informed decisions on equipment upgrades, training needs, and logistical support improvements. This ongoing process ensures that products and services continually evolve to meet the high standards and demands of military operations, ultimately enhancing mission success and soldier satisfaction.

5.9.3.4 Activity E.2.3, Management of Reliability Drivers through Failure Reporting Analysis and Corrective Action System (FRACAS).

FRACAS methodologies are to promote/improve the reliability and maintainability of a system. FRACAS provides a disciplined closed-loop process for solving reliability and maintainability issues at the design, development, production and fielding phases of the life cycle of a system. It is an essential element of every reliability program.

FRACAS provides a disciplined closed-loop process for solving reliability and maintainability issues at all stages of a systems life cycle. It originated in the 1970's and was formalized in 1985 via MIL-STD-2155 when the DoD chose to standardize the FRACAS process. This standard was converted to MIL-HDBK-2155 in 1995. FRACAS is referenced in SAE TA-STD-0017A in Activity E.2.3 – Management of Reliability Drivers through Failure Reporting Analysis and Corrective Action System.

Essential FRACAS activities include:

a. Capturing and recording information about failures and other reliability issues

b. Selecting, analyzing and prioritizing failures to determine the root cause

c. Identifying corrective actions and implementing them to prevent future occurrences of those failures

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d. Track over time reliability and maintainability information to be further analyzed

e. Utilizing failure analysis results and corrective actions to support additional reliability analysis

FRACAS is done typically after a system is fielded. Meaning, once failures begin to occur, and failure data can be obtained, a meaningful FRACAS analyses can be performed. Conducting FRACAS activities, provide several benefits to systems:

a. Identifying failures early and correcting them improves the reliability of the system

b. Facilitates understanding of failures on system of systems impacts

c. Analysis could reveal inherent or underlying reliability issues.

d. Validation or disproval of the original engineering baselines established by a Failure Modes, Effects and Criticality Analysis (FMECA)

FMECA methodologies are designed to identify likely and potential failure modes for a system, to determine the effects and risks associated with the identified failure modes, to effectively rank the failures by importance and seriousness to the survivability of the system, and to identify corrective actions required. While this definition sounds familiar to a FRACAS, what we find is a major difference between a FMECA and FRACAS is when they are performed.

Typically, a FMECA is performed during the development of a system, even before parts or systems physically exist, they may only exist as a design in an engineering system. A FMECA is done initially in support of the development of a supportability plan and strategy. Who, what, when, where how am I going to repair this system when a failure occurs? How often will a failure occur? Will the failure impact other systems? Will the failure impact the performance of the mission? How critical are the impacts of the failure? These are all questions that can be answered with the assistance of a properly performed FMECA.

The FMECA directly supports the execution of FRACAS. Both have the goal to improved reliability and maintainability, and use Mean Time Between Failure (MTBF), Mean Time Between Critical Failure (MTBCF), Mean Time to Repair (MTTR), etc. to measure the reliability of the system. The FMECA addresses potential problems before the system is fully designed. As the system is fully designed and tested the FMECA is less beneficial, and the FRACAS process begins drive the corrective actions.

Early implementation of corrective action also has the advantage of providing visibility of the adequacy of the corrective action in the event more effort is required. Early and detailed attention to each failure or fault as it occurs should limit the situation in which prioritization of open investigations causes a backlog, which results in correctable deficiencies left to field service to resolve over the years. FRACAS is performed in many cases during the Low-Rate Initial Production of a system during the Deployment phase as a function of Field Feedback.

5.9.3.5 Additional Information.

None.

5.9.4 Activity E.3, Disposal Analysis.

At the end of its useful life, a system should be demilitarized and disposed of in accordance with all legal and regulatory requirements and policy relating to safety (including explosives safety), security, and the environment" (DoDI 5000.02). During the design process hazardous materials contained in the system in the Programmatic Environment, Safety, and Occupational Health Evaluation (PESHE) should be documented and the system's demilitarization and safe disposal should be estimated and planned. Defense Logistics Agency (DLA) Guidelines reference DoDM 4160.21-V1, DoDM 4160.28, and DoDI 4160.28.

5.9.4.1 Overview.

Activities E.3.1 and E.3.2 are used to identify applicable demilitarization requirements necessary to eliminate the functional or military capabilities of assets and determine reutilization and hazardous-property disposal requirements for system/equipment and by-products.

5.9.4.1.1 Purpose.

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To identify the disposal/de-militarization procedures associated with a system/end item including facility equipment that focuses on those components, assemblies, sub-assemblies, parts and materials that contain hazardous materials, wastes and pollutants. Additionally, to identify those items that can be recycled, reused or salvaged.

5.9.4.1.2 Required for.

Establish and document technical procedures for the disposal of components, assemblies, sub-assemblies, parts and materials that contain hazardous materials, wastes or pollutants. Document the end-of-life disposal/de-militarization procedures required to deactivate the system/end item. Failure to accomplish this activity may affect the health and safety of all personnel involved in the operations and sustainment of the equipment. Demilitarization of the equipment and its components is a matter of national security and should be accomplished to ensure classified items are not compromised.

5.9.4.1.3 When Required.

Selective use of this activity (in conjunction with Activity D.1) during TMRR phase should be limited to the identification of new/critical resources that contain hazardous materials, wastes or pollutants. This activity is generally applicable during the EMD phase for components, assemblies, sub-assemblies, parts and materials. Disposal/de-militarization procedures for the system/end item are established during the system design process.

5.9.4.1.4 Applicable LPD Summaries.

LSA-036, LSA-039, LSA-046, LSA-068, and LSA-078.

5.9.4.1.5 Associated Standards.

SAE TA-STD-0017A.

5.9.4.1.6 Associated Products.

Disposal Procedures and Disposal List & Bill of Materials.

5.9.4.1.7 Responsibility.

The contractor performs the detailed technical procedures for the disposal of components, assemblies, sub-assemblies, parts and materials that contain hazardous materials, wastes and pollutants. The government is responsible for the disposal/de-militarization procedures for the system/end item and maintains overall responsibility.

5.9.4.1.8 LPD Documentation.

SAE GEIA-STD-0007 entities impacted are Task Analysis (C Entities), Provisioning and Cataloging Requirements (H Entities), and Hazardous Material Identification (S Entities).

5.9.4.2 Activity E.3.1, Component Disposal.

The Component Disposal manages processes related to retiring or removing a component from the system. Component disposal refers to the process of safely getting rid of system components, data, documentation, or tools.

5.9.4.3 Activity E.3.2, Product Disposal.

Product disposal definition is the process by which the goods a company produces are properly destroyed or disposed of. Product disposal involves safely destroying or disposing of a company’s goods. It’s crucial to

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follow a certified process to prevent illegal resale or use. Improper disposal can harm reputation, increase liability, and result in unintentional leaks of proprietary information.

5.9.4.4 Additional Information.

The paragraphs below contain useful information regarding this activity and sub-activities.

5.9.4.4.1 Disposal Analysis Plan.

A specific plan should be completed prior to the Operational Test and Evaluation (OT&E) milestone. Plans should be straight forward addressing the demilitarization and disposal requirements for the entire system, as well as subsystems, components, etc. (which may require individual unique demilitarization and disposal process requirements). For each item to be disposed of, the plan should address as a minimum the following:

a. Identification of the item.

b. Intended use of the item.

c. Item components and materials.

d. Disassembly instructions.

e. Related safety requirements.

f. Environmental considerations.

5.9.4.4.2 Addressing Demilitarization and Disposal Requirements.

Addressing demilitarization and disposal requirements is typically a logistics function best addressed by the service and system's logisticians, as well as the Defense Logistics Agency (DLA). The PM is required to apply DEMIL requirements during the entire system design process and prepare programmatic and procedural DEMIL plans and related documentation. A DEMIL plan is a set of procedures and information to assist in the performance of physical DEMIL or the programmatic conduct of analysis and planning for DEMIL. A DEMIL plan is a living document that should be updated throughout the total life cycle systems management process. There are two types of plans: procedural and programmatic. A procedural DEMIL plan provides information to support the performance of physical DEMIL and is needed before DoD personal property will be subject to a disposal requirement. The Programmatic DEMIL plan is tailored to each acquisition program that may be addressed as a stand-alone or integrated with other plans. It addresses how DEMIL considerations will be integrated into system engineering processes. It should be noted that for munitions programs demilitarization and disposal documentation should be in place before the start of developmental test and evaluation and prior to releasing the munitions in a non-military setting. Whichever approach is taken, the PM should ensure Environment, Safety, and Occupational Health (ESOH) requirements are integral when defining the demilitarization, disposition, and disposal requirements.

5.9.4.4.3 Update Demilitarization and Disposal Plan.

The demilitarization and disposal plan should be updated throughout the life of the system. An additional review of the demilitarization and disposal process should be completed 6-8 years prior to the end of the projected service life of the system (3-5 years prior for a short service life). The PM should plan and budget for the disposal and begin obtaining service specific approvals.

5.9.5 Activity E.4, In-Service Supportability.

The PSA process is a total life cycle concept that incorporates supportability from inception to disposal. Issues addressed during in-service support include field feedback, operational hazards/safety risks, identification of redesign opportunities to enhance system effectiveness and reliability, and revision of the BCS to represent the performance measured support solutions.

5.9.5.1 Overview.

In-Service supportability deals with support items in the operational phase.

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5.9.5.1.1 Purpose.

To provide product support during the operations phase of the systems acquisition process.

5.9.5.1.2 Required for.

To enhance the maintenance capabilities during operations and sustainment phases. The engineering change process augments the maintenance structure and support features. Field Feedback is required to capture opportunities for potential adjustments during the current phase of operations as well as future iterations of the system.

5.9.5.1.3 When Required.

Planning for this activity begins in the MSA phase and continues throughout the life cycle. During fielding, operations, or sustainment phase special emphasis given to the system throughout this phase.

5.9.5.1.4 Applicable LPD summaries.

All LPD summaries.

5.9.5.1.5 Associated standards.

SAE TA-STD-0017A.

5.9.5.1.6 Associated products.

Technical manuals/orders, RPSTL, stockage list type IV, COSAL, illustrated parts breakdown (IPB), LSA-036 design change notice

5.9.5.1.7 Responsibility.

The Government has responsibility beginning with the MSA phase. The contractor performs planning activities during the TMRR and EMD phase, but the government maintains overall responsibility. Upon completion of Milestone C, the type of contract dictates responsibility for support. For example, organic support is a responsibility of the Government, with Contractor Logistics Support agreements the responsibility shifts to the contractor for Product Support.

5.9.5.1.8 LPD Documentation.

All SAE GEIA-STD-0007 entities are impacted.

5.9.5.2 Activity E.4.1, Supportability in Mission Planning.

Items include the supportability data on the product in its operational environment from maintenance, supply, field feedback, operating reporting systems, and any special reporting system developed for the new product. Supportability for mission planning should include and assess all IPS resources assigned to the support of the mission. Provide mission planning documents recommending the revised support solution that redirects and reallocates the IPS elements to meet the mission needs in each phase.

5.9.5.3 Activity E.4.2, Supportability in Engineering Change.

The PSA process is essential to the ECP process, impacting both the product and its support solution. Therefore, PSA and supportability engineering principles are relevant to all approved product design changes and support solution updates. This activity results in the completion of necessary engineering changes during the operations and support phase.

5.9.5.4 Additional Information.

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None.

5.10 Activity Group F, Supportability and Suitability Assessment.

The Supportability and Suitability Assessment activity identifies constraints, thresholds, and areas of improvement to provide supportability and suitability input into early tradeoffs. This identification is completed by validating and verifying the tests, simulations, and evaluations of the system. These items are placed into the Test Evaluation Master Plan (TEMP) early in the life cycle. In addition to the testing procedures, performance assessment and measurement frameworks are created to validate the supportability aspects of the system.

5.10.1 General considerations.

The activities in this section are intended to ensure that suitability problems are identified and addressed. In addition, this section focuses on the evaluation of the performance of the product.

5.10.2 Activity F.1, Supportability and Suitability Test, Evaluation, Verification and Validation.

Initial suitability test and evaluation planning (Activity F.1.1) occurs prior to the life cycle phase in which the tests will be conducted. This planning should include identification of the resources (hardware, time, and support) required for testing. Test and evaluation strategies should be based on the supportability and supportability related design requirements; the supportability cost, and readiness drivers; and areas with a high degree of risk associated with them. Test and evaluation plans should include supportability objectives and criteria integrated with other system engineering test requirements. MSA phase planning should include strategies for evaluation (during TMRR phase testing) of design and operational features that affect the feasibility of the system/equipment's supportability, cost, and readiness objectives. Pre-Milestone B planning should include strategies for demonstrating (during Engineering, Manufacturing Development testing) established supportability and supportability related design objectives within stated confidence levels through the support maintenance level; evaluation of operability and operator training; demonstration of the adequacy of the product support plan to include all elements of IPS; quantification of requirements for fuel, ordnance, supply; identification of required system usage for supportability testing, and other IPS elements. Preproduction planning should include strategies for assessing mission hardware, software, and support items not fully tested prior to production; demonstration, in an operational environment, that initial production items meet the thresholds for mature systems; and refinement of operating tactics, training requirements, and force unit organizational concepts as required.

5.10.2.1 Overview.

Supportability test, evaluation, and verification is the process by which a system or components are compared against requirements and specifications through testing. The results are evaluated to assess progress of design, performance, supportability, etc.

5.10.2.1.1 Purpose.

To assess achievement of support parameters specified; identify reasons for variances from projections; and recommend changes to correct deficiencies and improve system readiness.

5.10.2.1.2 Required for.

The formal Test and Evaluation (T&E) program. This activity is used early on to develop a strategy for testing the support parameters of a system which are input to the system T&E Master Plan (TEMP). Criteria is established to identify test resources, procedures, and schedules required to meet TEMP input objectives; and to analyze T&E results, develop corrective action, and update the LCSP and LPD. Post deployment supportability assessment is obtained by analyzing the operational system maintenance and supply data. Without supportability testing, the risks associated with fielding the equipment from a performance and safety standpoint increase significantly.

5.10.2.1.3 When Required.

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Activity F.1 usually begins during MSA. Activities F.1.2, F.1.3, F.1.4, and F.1.5 are generally applicable during TMRR and EMD.

5.10.2.1.4 Applicable LPD Summaries.

All of the summaries defined in SAE TA-HB-0007-1, Logistics Product Data Summaries Handbook are applicable.

5.10.2.1.5 Associated Standards.

SAE TA-STD-0017A.

5.10.2.1.6 Associated Products.

Test & Evaluation Strategy, Updated Product Support Package, Test & Evaluation Plan, Test Results, and Corrective Actions.

5.10.2.1.7 Responsibility.

The contractor is responsible for developmental testing and preparation of the TEMP in coordination with the government. The government is responsible for operational test and evaluation and preparation of that portion of the TEMP. The contractor coordinates supportability testing with the government, which maintains overall responsibility.

5.10.2.1.8 LPD Documentation.

All SAE GEIA-STD-0007 entities are impacted.

5.10.2.2 Activity F.1.1, Test and Evaluation Strategy.

Create a Test and Evaluation Strategy (TES) including plans for logistics demonstrations, or “Log Demos,” to ensure that specified supportability and suitability requirements are achieved, or achievable, for input into test and evaluation plans. The TES should be based upon quantified suitability requirements, supportability, cost, and readiness drivers, and related issues with a high degree of risk. Tradeoffs should be conducted between the planned test length, cost, and statistical risks incurred. Potential test program limitations in verifying suitability requirements based on previous Test and Evaluation (T&E) experience and the resulting effect on the validity of the T&E should be documented.

5.10.2.3 Activity F.1.2, Product Support Package.

Update the PSP integrated product support elements, identifying support resources that will be evaluated during logistic demonstrations and tested/validated during development and operational tests.

5.10.2.4 Activity F.1.3, Test Objectives/Resources.

Establish and document T&E program objectives and criteria, and identify test resources, procedures, and schedules required to meet the objectives to be included in the coordinated test program and test plans. The established objectives and criteria should provide the basis for assuring that critical issues have been resolved and requirements have been achieved within acceptable confidence levels.

5.10.2.5 Activity F.1.4, Validation.

Conduct or participate in test activities with a specific focus on support resource performance. These tests are peculiar to logistics products and should be coordinated with other system engineering and logistics demonstrations and tests (e.g., support equipment first article tests, technical manual validation/verification, training tests, maintainability demonstrations, reliability and durability tests, product developmental and operational tests).

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5.10.2.6 Activity F.1.5, Analyze Test Results.

Analysis of data obtained from field reporting systems can provide significant information for system/equipment enhancements through product support resource modifications, product improvement programs, or modifications of operating tactics. Additionally, comparative analysis between field results, test and evaluation results, and engineering estimates can provide information for use on future acquisition programs to better project supportability, cost, and readiness parameters.

5.10.2.7 Additional Information.

The paragraphs below contain useful information regarding this activity and sub-activities.

5.10.2.7.1 Detailed Test Plans and Criteria.

Detailed test plans and criteria are established (Activity F.1.3) based on the test and evaluation objectives of the system/equipment. An important category of PSA program data is the identification of the IPS elements that should be provided to testing activities for test and evaluation. This identification is an integral part of Activities C.1, C.3, and D.1. Activity F.1 provides detailed plans for test and evaluation of these resources. Data resulting from testing will be analyzed as part of Activity F.1.4 to accomplish the following:

a. Correct deficiencies discovered during test and validate corrective actions implemented to eliminate deficiencies identified during previous tests.

b. Update system level projections for readiness, O&S costs, and product support resource requirements.

c. Identify the amount of improvement required in supportability and supportability related design parameters to meet established goals and thresholds.

d. Identify achievement or non-achievement of contractual requirements.

e. Provide an assessment of supportability for input into the materiel acquisition decision process.

f. Update LPD.

g. Provide a database of T&E experience and lessons learned for comparative analyses on future system/equipment acquisitions.

5.10.2.7.2 Requirements for Post Deployment Assessment of the New System/Equipment.

Requirements for post deployment assessment of the new system/equipment are provided for in Activity F.1.4. In those cases where existing standard field reporting systems will not provide the necessary data or accuracy to conduct this analysis, then supplemental data collection programs should be planned, approved, resourced, and implemented. Planning activities would normally occur prior to production, and data review and analysis would occur following deployment. Care should be exercised in planning this activity to ensure that field results are collected during field operations. Collecting data immediately after deployment may be biased if any of the following situations are in effect:

a. New equipment fielding teams are with the system/equipment.

b. Operator and maintenance personnel received training from other than the intended normal training sources.

c. Initial supply support was obtained from other than standard supply systems.

d. Interim support resources are being used pending deployment of other items (e.g., support and test equipment).

5.10.2.7.3 Operational Suitability.

Defined as the degree to which a system can be satisfactorily placed in field use with consideration to reliability, availability, compatibility, transportability, interoperability, wartime usage rates, maintainability,

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safety, human factors, habitability, manpower supportability, logistics supportability, documentation, environmental effects, and training requirements.

5.10.2.7.4 Types of Assessment.

There are two general areas of operational suitability assessment covered in this section: assessment as part of the formal test and evaluation program, and assessment after deployment through analysis of operational, maintenance, and supply data on the system/equipment in its operational environment. In the first case, the assessments are made prior to deployment and, where applicable, upon initial deployment during follow-on test and evaluation. In the second case, the assessments are made based upon data available on the system/equipment in its normal operating environment.

5.10.2.7.5 Test and Evaluation.

The supportability test and evaluation program should serve three objectives: (1) provide measured data for supportability and supportability related design parameters for input into system level estimates of readiness, O&S costs, and product support resource requirements; (2) expose supportability problems so that they can be corrected prior to deployment; and (3) demonstrate contractual compliance with quantitative supportability and supportability related design requirements. Test and evaluation planning, scheduling, and cost investment should be related to these objectives to maximize the return on investment. Development of an effective test and evaluation program requires close coordination of efforts between all system engineering disciplines to prevent duplication of tests and to maximize test program effectiveness. Reliability tests, maintainability demonstrations, publications validation/verification efforts, environmental tests, endurance/durability tests, and other tests should be used in satisfying supportability assessment requirements. A well-integrated test program involves establishing test conditions that maximize the utility of the test results. This is an important factor considering that the availability of hardware and time to conduct tests and evaluations are generally at a premium for most acquisitions, and that test results are a vital feedback loop because they represent the first hard data available for the new system/equipment.

5.10.2.7.6 Test Environment.

One major factor that determines the utility of test results to satisfy the objectives of the supportability test and evaluation program is the test environment. Historically, there has been a large gap between test results and field-observed parameters. This wide gap is primarily caused by conducting tests in ideal environments, using contractor technicians to perform maintenance during test, ignoring some test results (non-chargeable failures), and not using the planned resources (technical manuals, tools, test equipment, personnel, etc.) during the tests. Realistic test environments should be established considering the intended operational environment and the intended product support resources (all elements of IPS) that will be available to operate and maintain the system/equipment after deployment. While a total simulation of the field environment may not be practical or cost effective, test environments should be established to be as close as possible and known differences between the test and field environments should be accounted for in using test results to update system level projections for readiness, O&S costs, and product support resource requirements. Additionally, expected levels of maturation to supportability parameters should be applied to test and evaluation results to get a good projection of expected supportability.

5.10.2.7.7 Post-Deployment Assessments.

A system's ultimate measure of supportability is determined by how well it performs in its environment after deployment. Analysis of feedback data from the operational environment is the necessary final step in verifying that the system/equipment has met its objectives and in evaluating post deployment support. In some cases, this assessment can be made using field feedback data that is routinely available from standard readiness, supply, and maintenance reporting systems. In other instances, data from standard reporting systems should be supplemented to meet the verification objective within acceptable confidence levels. Any requirement for supplemental data should be weighed against the cost and resources to obtain the data and any impact upon using units to gather the data.

5.10.3 Activity F.2, Supportability Performance Assessment.

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This assessment evaluates the performance of the product and its support solution against operational supportability parameters and supportability performance objectives. Measurement of the actual values of the supportability parameters should be based on the performance metrics. Identify reasons for deviations and recommend corrective actions to address deficiencies and enhance product readiness and affordability.

5.10.3.1 Overview.

An activity utilized to evaluate supportability and suitability performance.

5.10.3.1.1 Purpose.

The objectives and criteria established here will provide the basis for assuring that critical Supportability Performance Assessment results have been resolved or achieved within acceptable performance levels. The supportability performance assessment should serve three objectives:

a. Provide measured data for supportability and related design parameters to input into system-level estimates of readiness, O&S costs, and product support resource requirements.

b. Identify supportability problems so they can be resolved before deployment.

c. Demonstrate compliance with contractual supportability and related design requirements.

5.10.3.1.2 Required for.

TEMP.

5.10.3.1.3 When required.

The Supportability Performance Assessment is prepared in the Materiel Solution Analysis (MSA) phase and updated in all subsequent phases.

5.10.3.1.4 Applicable LPD Summaries.

LSA-019, LSA-055, LSA-056.

5.10.3.1.5 Associated Standards.

SAE TA STD-0017A.

5.10.3.1.6 Associated Products.

TEMP, Data Collection and Analysis Plan, SEP, LOGDEMO

5.10.3.1.7 Responsibility.

The contractor is responsible for developmental testing and preparation of the TEMP in coordination with the government. The government is responsible for operational test and evaluation and preparation of that portion of the TEMP. The contractor coordinates supportability testing with the government, which maintains overall responsibility.

5.10.3.1.8 LPD Documentation.

X Entities (Cross Functional Requirements), B Entities (Reliability Requirements and Analysis), C Entities (Task Analysis), and H Entities (Provisioning and Cataloging Requirements).

5.10.3.2 Activity F.2.1, Establish Performance Measurement Framework.

Develop the performance measurement framework (i.e., a consistent approach for systematically collecting, analyzing, utilizing and reporting on the performance of the product) to incorporate the supportability

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parameters determined to be useful and reliable indicators of the effectiveness of the support solution. The performance measurement framework will be the basis for In-Service Support contract agreements against which performance should be assessed. Performance indicators may exist at all levels of the support solution. The performance measurements may include:

a. Methodologies used to calculate observed values can be pulled from comparative analysis depending on what test(s) were completed from previous systems. Examples of KPPs/KSAs could include availability, energy, survivability, sustainability, force protection, training, etc.

b. Frequency of measurements. Would be derived from KPPs or KSAs from previous system or fielded data.

c. Desired results. Observed values can be pulled from comparative analysis depending on what test(s) were completed from a previous system.

5.10.3.3 Activity F.2.2, Measure and Compile Supportability Performance Data.

Establish a process to measure and record the actual values of supportability parameters. Store these values in a data management system, compiling them to reflect true values over the measurement period.

5.10.3.4 Activity F.2.3, Analyze Performance Levels.

Analyze the measured values of the supportability parameters against the Product Support Baseline (PSB). Review the supportability events (e.g., reported failures; repair actions; mean time to repair; preventive maintenance; demand for repair parts and spares; product usage) and compare events with predicted events in the PSB. Assess the effects of the variance between actual measured values and the expected baseline on the product's support solution. The performance of the support solution should be determined, and remedial action defined to correct deficiencies.

5.10.3.5 Activity F.2.4, Propose Changes to Support Solution.

Propose and direct changes to the support solution to address performance issues. Changes can be engineering, IPS support resources, maintenance concepts, service adjustments, or revised supportability documentation (i.e., LPD, BCS updates).

5.10.3.6 Activity F.2.5, Update Performance Measurement Framework, PSP, and LPD.

Revise the documented support plan and product support resource requirements within the LPD and Product Support Plan (PSP) based on the Performance Assessment results. Quantify the impact of these updates on projected costs, readiness, and product support resource parameters for the operational product. Update the performance measurement framework to incorporate new measurement methods or adjust expected values as required.

5.10.3.7 Additional Information.

None.

5.11 Tailoring.

Tailoring is the process of evaluating individual requirements to determine if they are pertinent and cost-effective for a specific acquisition, modifying the requirements to ensure they are kept to a minimum to address actual needs, and that balance is maintained between needs and costs. Rewriting, extracting, or eliminating requirements accomplishes tailoring of standardization documents. This section of the handbook is intentionally structured to discourage indiscriminate blanket applications of PSA activities. Tailoring is forced by requiring that specific activities be selected and that certain essential information relative to implementation of the selected activities be provided by the requiring authority. Tailoring is recommended to address alternative acquisition pathways (see FIGURE 2) as appropriate. The contractor may, and is encouraged to, suggest alternative means of satisfying requirements to make information more readily available and to utilize more efficient business practices by:

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a. Evaluating each requirement in a standard or Data Item Description (DID) to determine whether it is necessary and cost effective for a given program.

b. For standards and specifications, omitting or adding to the requirements, as appropriate.

c. Omitting or adding requirements in a manner that does not increase required workload.

5.11.1 Purpose and Scope.

This section provides guidance on how to tailor SAE TA-STD-0017A. It also suggests criteria for selection by the government of the activities to be performed. The entity acquiring the analysis data is required to carefully review their respective needs for data. This guidance provides the government an opportunity to specify the activities to be performed during the acquisition of a system based on the type of acquisition and the time within the system's life cycle. Application guidance and rationale for selecting activities and tailoring activity descriptions to fit the needs of a particular program are contained in this handbook. PSA is intended to be tailored for each type of activity to which it is applied.

5.11.2 Considerations.

There are many different aspects to take into consideration when tailoring SAE TA-STD-0017A. The following items should be considered. These items are not all-inclusive.

5.11.3 Acquisition Phase.

The current Acquisition phase will dictate which activities should be performed and which activities may be tailored out. For instance, during the MSA phase, Task Analysis (Activity D.1), may not be required as a materiel solution has not yet been decided; therefore, maintenance activities will not yet be known.

5.11.4 Unique Manufacturing Process.

A goal of any acquisition is to keep costs at a minimum. Using standard or commonly used parts whenever possible improves system dependability and readiness, benefiting the user. Maximizing the use of DoD owned inventory, standard or commonly used parts whenever possible improves system dependability and readiness, benefiting the users. A single source of supply can be more expensive than if contractors have an incentive to lower prices based on competition. This can also result in delays of critical parts and cause system safety concerns for the user.

5.11.5 Technology.

Opportunities to use technologies should always be a consideration to improve supportability (Activity B.4). However, using technologies that are not mature may have more risks associated than those technologies that have a higher Technology Readiness Level (TRL). Lower TRL levels may also cost more in terms of development, time, and money. For instance, considering the use of a new, unproven technology that has no previous DoD implementation, may require more testing for fit than a more mature technology. Associated with Product Support specifically, an unproven technology, may pose risks in developing maintenance plans and safety assessments.

5.11.6 Complexity.

Complexity of the system often dictates how easy the system is to operate and maintain. Complex systems often have a higher price tag. Where possible, the government should evaluate trade-offs related to the complexity of the system in providing the best and most reliable system with the lowest price tag (Activity C.3). The level of detail required in describing complex systems will vary depending on the amount of detail known on the new system/equipment's design, operational and support characteristics, and the accuracy required in the estimates for new system/equipment parameters.

5.11.7 Criticality of Performance.

How critical the performance of the part is to availability plays a major role in determining which activities should be performed. For example, a FMECA (Activity C.1.6) identifies the likely modes of failure, the possible effects of each failure, and the criticality of each effect on mission completion, system safety,

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environment, or some other outcome of significance. The determination of whether to perform a FMECA and when depends on the criticality of performance of the hardware and the current phase of the acquisition life cycle.

5.11.8 Quantity/Rate of Production/Price Goals.

Buying in bulk is often less expensive than buying small lots or single items. Buying in bulk also reduces the amount of time it takes to get a replacement part or tool to the warfighter as there are more parts in inventory at a given time. However, inventory can be costly if the parts become obsolete before they are used. Also, the cost of storing parts is expensive, especially those items that should have special storage considerations. It is therefore important for evaluation of current and future needs in terms of availability and cost. (Activities D.1.8, D.1.11, and E.1)

5.11.9 Product Support Concept.

There are several possible scenarios for providing Product Support; Performance Based Logistics (PBL), Contractor Logistics Support (CLS), organic support, a mix of contractor and organic support, Public-Private Partnerships, etc. CLS is defined as a contracted weapon system sustainment consisting of multiple maintenance and support functions that occurs over the life of a weapon system. In the PBL product support, the government oversees the process and ensures the design is optimized for support, and the contractor should provide the service dictated by a set of performance parameters, rather than a contract that specifies actions. Tailoring of SAE TA-STD-0017 for a PBL contract might include only contracting for updating the Product Support Strategy (Activity A.1.3), providing a PSAP and updating as needed (Activities A.2.1 and A.2.2), providing Program and Design Review documentation and participation in meetings (Activity A.3), etc.

5.11.10 Who Performs Tailoring.

Tailoring is a team effort. The preceding paragraphs show both the government and the contractor participating in the tailoring. The government should also solicit participation from other interested parties, such as Technical Staff, Systems Engineering, Configuration Management, Quality Assurance, Test Personnel, Contracting and Contract Administration Personnel, Use Personnel, and Support Personnel. The team approach has significant benefits. It ensures that each organization affected by the contract has an opportunity to state its needs, and it takes advantage of the combined expertise of all participants. Ultimately, all final decisions about tailoring remain the responsibility of the government. For more information on configuration management, refer to SAE EIA-649, Configuration Management Standard and SAE EIA-836.

5.11.11 Why Tailor.

Tailoring invokes only those minimum requirements which are absolutely necessary for program success. Unnecessary requirements cause cost and schedule overruns and can ultimately cause a program to fail. The goal of tailoring is to evaluate program performance/execution risk against cost and schedule to determine those activities that are necessary for the program success and the user's safety. In making tailoring decisions, it is important to perform a risk analysis to balance near-term savings of cost and schedule against long-term risks.

5.11.11.1 DoD Directed.

DoDI 5000.02 authorizes Milestone Decision Authorities (MDAs) to tailor the regulatory information requirements and acquisition process procedures in this instruction to achieve cost, schedule, and performance goals.

5.11.11.2 Cost Avoidance.

Tailoring avoids unneeded activities, controls, and practices. It can also eliminate duplicative requirements that may be invoked when multiple standards are on contract. These measures result in cost avoidance.

5.11.11.3 Shorter Schedules.

By avoiding unnecessary requirements, projects can be performed more quickly and their products delivered and fielded sooner.

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5.11.12 When is Tailoring Performed.

Tailoring begins even before the acquisition cycle starts. During requirements development, the government will determine its needs based on the type of acquisition: Modification, Commercial Item, Non-developmental Item or Developmental Item, or Service. A developmental item may require more PSA activities be placed on-contract, than a Commercial Item. During the contracting process, more tailoring is performed through preparation of the Request for Proposal (RFP), during proposals and negotiations. Finally, throughout the performance of the contract, tailoring often continues as reexamination of the program requirements is recurring especially at major milestones. Tailoring is performed from requirements development through RFP, proposals, final offers, negotiations and throughout the project.

5.11.12.1 Analysis Strategy.

The key to a productive but cost-effective analysis effort is the concentration of available resources on activities which most benefit the program. Such concentration might be called the analysis strategy. This involves the establishment of an analysis program which will evolve achievable supportability and support system objectives. The broad objectives of PSA are to influence hardware design, structure the most effective support concept, and to define product support resource requirements. These general objectives should be translated into more specific objectives for individual projects, particularly in early phases when maximum flexibility exists. Objectives are iterated and refined until they become firm program goals or requirements. Development of an analysis strategy is a very difficult task involving a large number of interacting variables. Strategy considerations and the possible impact of these variables should be addressed in the tailoring process. Analysis activities should be tailored and scheduled to meet project decision points. The guidance included here is designed to assist in the tailoring process; however, it is not all inclusive and requires adaptation to specific programs.

5.11.12.2 During RFP Development and Responses.

Initial tailoring is often performed during preparation of a draft RFP. The government assesses the program and its objectives and determines the necessary requirements from the PSA standard. The government then selects the appropriate DIDs to be included in the draft SOWs. The required standard should be referenced in the SOW. Experience has shown successful tailoring has included the government inviting potential contractors to submit recommendations, suggestions, or alternatives in preparation of the draft RFP. It is important to begin the tailoring process within the draft RFP. The tailoring will become more defined as the contract process progresses. It is strongly recommended that the draft RFP requests feedback on the tailoring as well as on other aspects of the procurement. Any and all technical data rights should have been identified in the Technical Data Rights Strategy (TDRS) and Intellectual Property Management Plan for Product Support in the LCSP and should be a direct comparison between the TDRS and what is included found in the RFP. During RFP response, prospective bidders' comments should include proposed revisions to the draft RFP to further refine specific tailoring of requirements and the DIDs. This tailoring provides each prospective bidder's perspective for the most cost-effective manner to address program requirements. The RFP is often revised over multiple iterations based on input from the prospective bidders. After reviewing all input, the government develops a list that reflects the best of all the offers. This becomes the final RFP on which bidders will base their proposals.

5.11.12.3 During Proposals and Best and Final Offers.

Bidders' proposals may contain additional or revised tailoring if permitted by the final RFP. Bidders are often encouraged to suggest alternative standards and practices in place of military standards cited as requirements or guidance in the RFP. The amount and type of tailoring submitted in this step will depend upon how the procurement is structured. Often, the bidders may identify redundant requirements or requirements that were not previously identified. This is called tailoring down or tailoring up. Depending upon the procurement, bidders may perform additional tailoring with the presentation of their Best and Final Offers. Tailoring may continue after the Best and Final Offer RFP is released.

5.11.12.4 During Contract Negotiations and throughout the Project.

Additional tailoring may occur as part of contract negotiations with the winning bidder. By this stage of the contract negotiations the tailoring of the standard is very specific. As the project proceeds, both the

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government and the contractor will learn more about the effort to be performed and the activities. It is expected that this ongoing learning experience will be reflected in revised tailoring of both SAE TA-STD-0017A and DIDs. Reexamination is especially appropriate at significant project events.

5.11.13 How is Tailoring Performed.

The tailoring information provides the government an opportunity to specify the activities to be performed during the acquisition of a system based on the type of acquisition and the phase of the system's life cycle. Individual activities contained in this document will be selected and the descriptions tailored to specific acquisition program characteristics and life cycle phase.

5.11.13.1 Tailoring Standards, Specifications and Statements of Work.

As appropriate, an agency may tailor by evaluating each standard to delete, modify, or add requirements. Located in Section C of the RFP is the SOW. The SOW indicates the activities to be performed by the contractor. SAE TA-STD-0017A is the default standard for the acquisition of PSA data.

5.11.13.1.1 Non-Modification of Requirements.

If the decision is not to modify an activity along with its associated sub-activities, as stated within SAE TA-STD-0017A, state the following in the SOW. CDRL A056 can be seen on FIGURE 7.

> "The contractor should perform a Support System Alternative Analysis (Activity C.2) in accordance with SAE TA-STD-0017A including the five sub-activities on the ABCD System and be delivered IAW CDRL."

5.11.13.1.2 Modification of Requirements.

If it is decided to modify an activity and perform only a partial subset of the activities, state the following within the SOW. CDRL A056 can be seen on FIGURE 8.

> "The contractor should perform a partial Support System Alternative Analysis (Activity C.2) IAW SAE TA-STD-0017A, but should only perform activities C.2.1, C.2.2, and C.2.5 on the ABCD System and be delivered IAW CDRL A056."

5.11.13.2 Using CDRLs to Tailor the DID.

As appropriate, an agency may tailor Data Item Descriptions (DID) by deleting unnecessary requirements or modifying requirements in a manner that does not increase the workload. When PSA activities are performed by a contractor, activity documentation that is required for delivery to the government will be specified on the CDRL, DD Form 1423, with appropriate DIDs being cited. The CDRL will identify data and information that the contractor will be obligated to deliver under the contract. DIDs are used to define and describe the data required to be furnished by the contractor. Applicable DIDs that describe the data resulting from performance of the PSA activities contained in SAE TA-STD-0017A are identified in TABLE A-I. Each paragraph containing format and content instructions should be identified by number or letter to permit tailoring by reference. This is normally done by referencing appropriate paragraph identifiers in Block 16 of the CDRL for deletion or application. For example, if the requiring authority wants a System/Design Trade Study Report which only covers the tradeoff analysis results (Activity C.3) or the data from only one of the tradeoff Activities (e.g., Activity C.3.6), this can be accomplished through appropriate entries on the CDRL. By appropriately completing the CDRL and referencing only those paragraphs of the DID applicable to the deliverable, the requiring authority can structure the deliverable data products to cost effectively meet program requirements. Programs utilize the DD Form 250 when receiving contracted items from the customer.

5.11.13.3 Relationship of the SOW to the CDRL and DID.

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The SOW establishes a specific work requirement. The associated CDRL orders delivery of data products, summaries, reports, products and other information and identifies due date(s), frequency for submission, distribution, tailoring requirements, etc. The DID provides the format and content requirements for a particular training data.

5.11.13.4 Tailoring DIDs.

Several DIDs were created to accompany the standard while utilizing existing DIDs that currently satisfy the standards requirements. For example, DI-MISC-80711A can be used as a summary for some of the analyses. While other analyses can be delivered in SAE GEIA-STD-0007 format and use either DI-SESS-81758A for the data or DI-SESS-81759A for the summaries. Review each DID to identify applicable data formats. The CDRL (DD Form 1423) Block 16 is used to specify which format(s) is required for a specific application.

5.11.13.4.1 Non-Modification of Requirement.

FIGURE 7 is an example of a CDRL with a DID that will place SAE TA-STD-0017A Activity C.2.2 on contract. The example is associated with SOW example in 5.11.13.1.1.

CONTRACT DATA REQUIREMENTS LIST
(1 Data Item)

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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 reviewing 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 (0704-0188), Washington, DC 20503. Please DO NOT RETURN your form to either of these addresses. Send completed form to the Government Issuing Contracting Officer for Contract/PR No. listed in Block E.

A. CONTRACT LINE ITEM NO.	B. EXHIBIT **A**	C. CATEGORY: TDP TM OTHER ADMIN/MGMT DATA
D. SYSTEM/ITEM **ABCD System**	E. CONTRACT/PR NO. **W32T6H-12-E-0723**	F. CONTRACTOR **Rusty Nails, Inc.**
1. DATA ITEM NO. **A056**	2. TITLE OF DATA ITEM **Technical Report – Study/Services**	3. SUBTITLE **Support System Alternatives Analysis**
4. AUTHORITY *(Data Acquisition Document No* **DI-MISC-80508B**	5. CONTRACT REFERENCE **2.1**	6. REQUIRING OFFICE **AMXLS-AL**

7. DD 250 REQ **N/A**	9.DIST STATEMENT REQUIRED **A**	10. FREQUENCY **ONE/R**	12. DATE OF FIRST SUBMISSION **14 DEC**	14. DISTRIBUTION	b. Copies		
8. APP CODE **A**		11. AS OF DATE **N/A**	13. DATE OF SUBSEQUENT SUBMISSION **AS NEEDED**	a. ADDRESSEE	Draft	Final Reg	Repro
16. REMARKS: **Requires government approval. Deliver in digital form that is readable by Microsoft products.** **Deliver results of Activity C.2 IAW SAE TA-STD-0017**				**LOGSA ATM**	**0**	**1**	
				15. TOTAL →	**0**	**1**	**0**

G. PREPARED BY **Scot Motquin**	H. DATE 06 Jun 22	I. APPROVED BY **Greg Tarver**	J. DATE 13 Jun 22

FIGURE 7. CDRL example, non-modification of requirements

5.11.13.4.2 Modification of Requirement.

FIGURE 8 provides an example of a CDRL which contains a DID that will enable SAE TA-STD-0017A Activity C.2 to be placed on contract. The example is associated with SOW example in 5.11.13.1.2.

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A. CONTRACT LINE ITEM NO.		B. EXHIBIT **A**		C. CATEGORY: TDP TM OTHER ADMIN/MGMT DATA					
D. SYSTEM/ITEM **ABCD System**		E. CONTRACT/PR NO. **W32T6H-12-E-0723**		F. CONTRACTOR **Rusty Nails, Inc.**					
1. DATA ITEM NO. **A056**	2. TITLE OF DATA ITEM **Technical Report – Study/Services**			3. SUBTITLE **Support System Alternatives Analysis**					
4. AUTHORITY *(Data Acquisition Document No* **DI-MISC-80508B**		5. CONTRACT REFERENCE **2.1**		6. REQUIRING OFFICE **AMXLS-AL**					
7. DD 250 REQ **N/A**	9.DIST STATEMENT REQUIRED **A**	10. FREQUENCY **ONE/R**	12. DATE OF FIRST SUBMISSION **14 DEC**	14. DISTRIBUTION					
8. APP CODE **A**		11. AS OF DATE **N/A**	13. DATE OF SUBSEQUENT SUBMISSION **AS NEEDED**	a. ADDRESSEE	b. Copies Draft	Final Reg	Repro		
16. REMARKS: **Requires government approval. Deliver in digital form that is readable by Microsoft products.** **Tailor** **Deliver results of Activity C.2.1, C.2.2, & C.2.5 IAW TA-STD-0017**				**LOGSA ATM**	**0**	**1**			
				15. TOTAL →	**0**	**1**	**0**		
G. PREPARED BY **Scot Motquin**		H. DATE 06 Jun 22		I. APPROVED BY **Greg Tarver**			J. DATE 13 Jun 22		

FIGURE 8. CDRL example, modification of requirements

5.11.13.5 During the Acquisition Life Cycle.

A systematic and comprehensive analysis should be conducted on an iterative basis through all phases of the system/equipment life cycle to satisfy sustainment objectives. The level of detail of the analyses and the timing of activity performance will be tailored to each system/equipment and will be responsive to program schedules and milestones. TABLE II should be used as a reference for identifying the SAE TA-STD-0017A activities and activities listed on FIGURE 9 through FIGURE 12.

TABLE II. TA-STD-0017A Activity key

TA-STD-0017A Activity Key			
A.1	**Product Support Strategy**	**C.2**	**Support System Alternatives**
A.1.1	Develop Supportability Objectives	C.2.1	Alternative Support Concepts
A.1.2	Identification and Measurement of Cost Drivers	C.2.2	Support Concept Updates
A.1.3	Update the Product Support Strategy	C.2.3	Alternative Support Plans
A.2	**Product Support Analysis Planning**	C.2.4	Support Plan Updates
A.2.1	Product Support Analysis Plan (PSAP)	C.2.5	Support Plan Risks
A.2.2	Plan Update	**C.3**	**Evaluation of Alternatives and Tradeoff Analysis**
A.3	**Program and Design Reviews**	C.3.1	Tradeoff Criteria
A.3.1	Design Review Procedures	C.3.2	Support System Tradeoffs
A.3.2	Design Review	C.3.3	Sensitivity of Support Tradeoffs
A.3.3	Program Reviews	C.3.4	Manpower/Personnel/Training Tradeoffs
A.3.4	Technical Interchange Meetings	C.3.5	Job/Duty Tradeoffs
A.4	**Integrated Data Environment for Product Support (IDE-PS)**	C.3.6	Level of Repair Analysis
A.4.1	Examine Stakeholder Information Environments	C.3.7	Diagnostics Tradeoffs
A.4.2	Create the Integrated Data Environment for Product Support	C.3.8	BCS/New Product Tradeoffs
A.4.3	Update the Integrated Data Environment for Product Support	C.3.9	Energy Tradeoffs
A.4.4	DevSecOps	C.3.10	Damage/Repair Tradeoffs
A.4.5	Digital Thread	C.3.11	Transportability Tradeoffs
B.1	**Application and Usage**	C.3.12	Facility Tradeoffs
B.1.1	Intended Use/Capabilities	**D.1**	**Task Analysis**
B.1.2	Quantitative Factors	D.1.1	Task Analysis
B.1.3	Field Visits	D.1.2	Document Task Analysis
B.1.4	Intended Use/Capabilities Report	D.1.3	New/Critical Resources
B.2	**Support System Standardization**	D.1.4	Training Requirements
B.2.1	Support Resource Standardization	D.1.5	Design Influence
B.2.2	Standardization Costs	D.1.6	Risk Reduction
B.2.3	Hardware/Software Standardization Approaches	D.1.7	Transportability Analysis
B.2.4	Standardization Risks	D.1.8	Supply Support

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TA-STD-0017A Activity Key			
B.3	**Comparative Analysis**	D.1.9	Logistics Products
B.3.1	Comparative Products	D.1.10	Task Analysis Updates
B.3.2	Baseline Comparative System	D.1.11	Parts Screening
B.3.3	BCS Logistics Requirements	D.1.12	Environment, Safety and Occupational Health (ESOH) Analysis
B.3.4	BCS Qualitative Constraints	**D.2**	**Early Distribution and Fielding Analysis**
B.3.5	BCS Supportability, Costs, and Readiness Drivers	D.2.1	System Impacts
B.3.6	Unique System Drivers	D.2.2	Impacts on Manpower and Personnel
B.3.7	BCS Updates	D.2.3	Readiness Impacts
B.3.8	BCS Risks	D.2.4	Survivability Analyses
B.4	**Technological Opportunities**	D.2.5	Impact Solutions
B.4.1	Identify Potential Technology	**E.1**	**DMSMS Management, Obsolescence Management and Counterfeit Prevention**
B.4.2	Update Design Objectives	E.1.1	DMSMS and /Obsolescence Management
B.4.3	Technology Risks	E.1.2	Counterfeit Prevention
B.5	**Supportability and Supportability-Related Design Factors**	**E.2**	**Field Feedback**
B.5.1	Supportability Characteristics	E.2.1	Feedback Sources
B.5.2	Sensitivity Analysis	E.2.2	Feedback Analysis
B.5.3	Intellectual Property (IP) and Data Rights	E.2.3	Management of Reliability Drivers through Failure Reporting Analysis a Corrective Action System (FRACAS)
B.5.4	Identify Risks	**E.3**	**Disposal Analysis**
B.5.5	Key Performance Parameters	E.3.1	Component Disposal
B.5.6	Market Limitations	E.3.2	Product Disposal
B.5.7	Update Objectives, Goals, and Thresholds	**E.4**	**In-Service Supportability**
B.5.8	Advanced Manufacturing	E.4.1	Supportability in Mission Planning
C.1	**Functional Requirements**	E.4.2	Supportability in Engineering Change
C.1.1	Functional Requirements Identification	**F.1**	**Supportability and Suitability Test, Evaluation, Verification and Validation**
C.1.2	Unique Item Functions	F.1.1	Test and Evaluation Strategy
C.1.3	Function Drivers	F.1.2	Product Support Package
C.1.4	Function Risks	F.1.3	Test Objectives/Resources
C.1.5	Failure Modes and Effects Analysis (FMEA)	F.1.4	Conduct Tests
C.1.6	Failure Mode, Effects, and Criticality Analysis (FMECA)	F.1.5	Analyze Test Results
C.1.7	Fault Tree Analysis (FTA)	**F.2**	**Supportability Performance Assessment**
C.1.8	Reliability-Centered Maintenance Analysis (RCM)	F.2.1	Establish Performance Measurement Framework
C.1.9	Task Inventory	F.2.2	Measure and Compile Supportability Performance Data
C.1.10	Design Alternatives	F.2.3	Analyze Performance Levels
C.1.11	Function Updates	F.2.4	Propose Changes to Support Solution
		F.2.5	Update performance measurement framework, PSP, and LPD

5.11.13.6 Conventional PSA Process Flow for the Pre–Materiel Development Decision (MDD) and MSA Phases.

The decision to proceed into the MSA phase is made during the Pre MDD phase based upon the CBA and ICD. The ICD identifies a desired capability that is to be satisfied by the acquisition of a specific system/equipment. Entering the MSA phase is contingent upon approval of the Initial Capabilities Document (ICD). The MSA phase will assess and recommend materiel solutions for the capability need identified in the ICD. Along with the approval of the materiel solution to the capability need in the ICD, Milestone A approves entry into the TMRR phase. This is accomplished by stepping through Activities B.1 and A.1 prior to beginning the initial set of parallel Activities (B.2, B.3, B.4, C.1, C.2, and C.3). This is followed by the iterative process contained between Activities B.5 and F.1. It should be noted that Activity A.3 is a management activity that is an integral part of the PSA process though not shown in FIGURE 9. Each one of the activities, indicated by the boxes in FIGURE 9, can be tailored even further to fit the program needs.

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NOTE: 1. Activities C.1.6, C.1.7, and C.1.8 may be deferred to the TMRR phase.

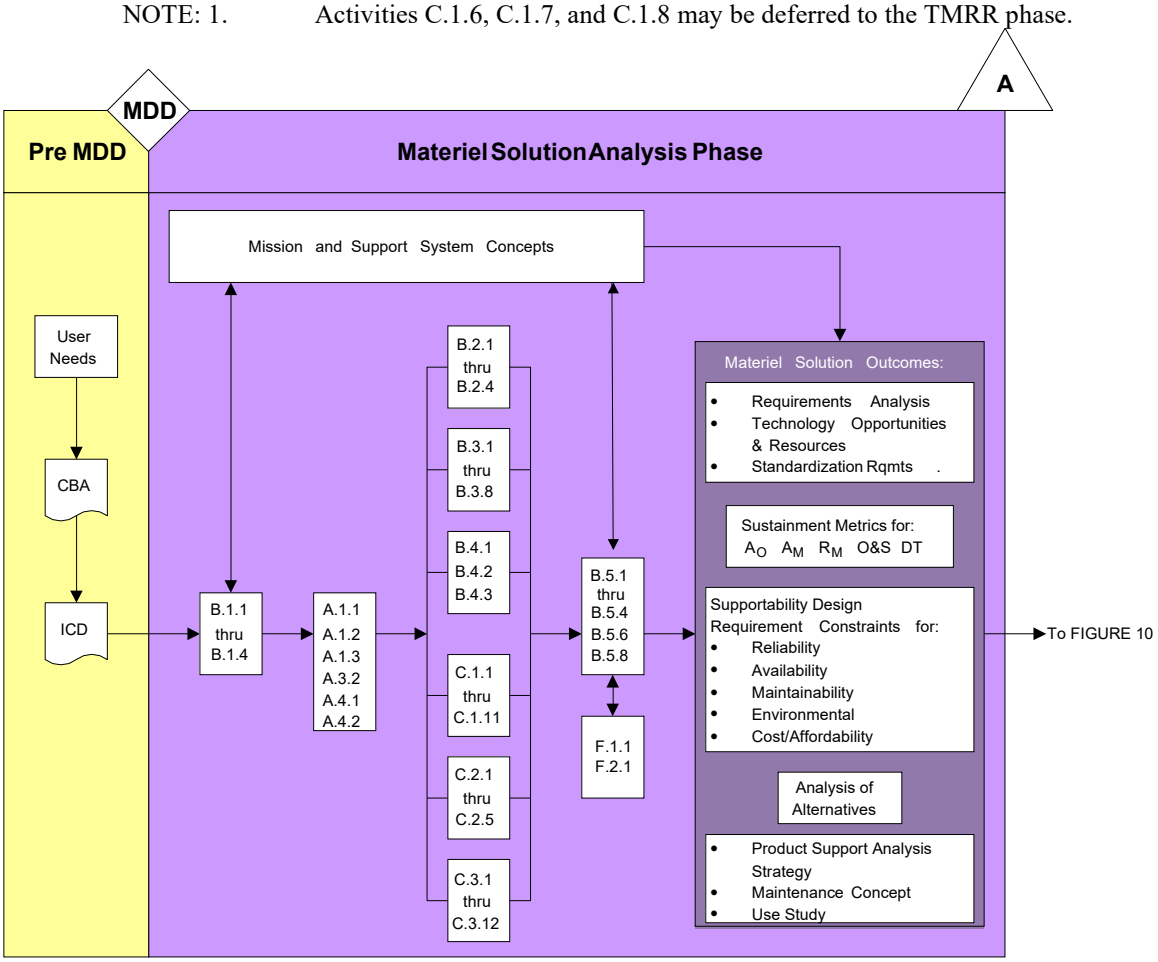


FIGURE 9. Conventional PSA process flow for Pre MDD and MSA phases

5.11.13.7 Conventional PSA Process Flow for the TMRR Phase.

The TMRR phase is initiated by a successful Milestone A decision. The goal of the TMRR phase is to reduce technology cost and schedule risk, demonstrate critical technology through competitive prototyping, complete preliminary design and determine the appropriate set of technologies to be integrated into the full system. To proceed to the next phase, the TMRR phase should demonstrate the technology in a relevant environment and identify manufacturing risks. An approved CDD is also necessary to proceed beyond Milestone B.

5.11.13.7.1 Tailoring During the TMRR Phase.

This process begins with Activities A.1, A.2, and B.1 prior to updating the set of parallel Activities (B.2, B.3, B.4, C.1, C.2, and C.3) to account for any changes. Activity D.1 follows the parallel set and leads into another

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parallel set of Activities (E.1 and E.3). The iterative process contained between Activities B.5 and F.1 is next.

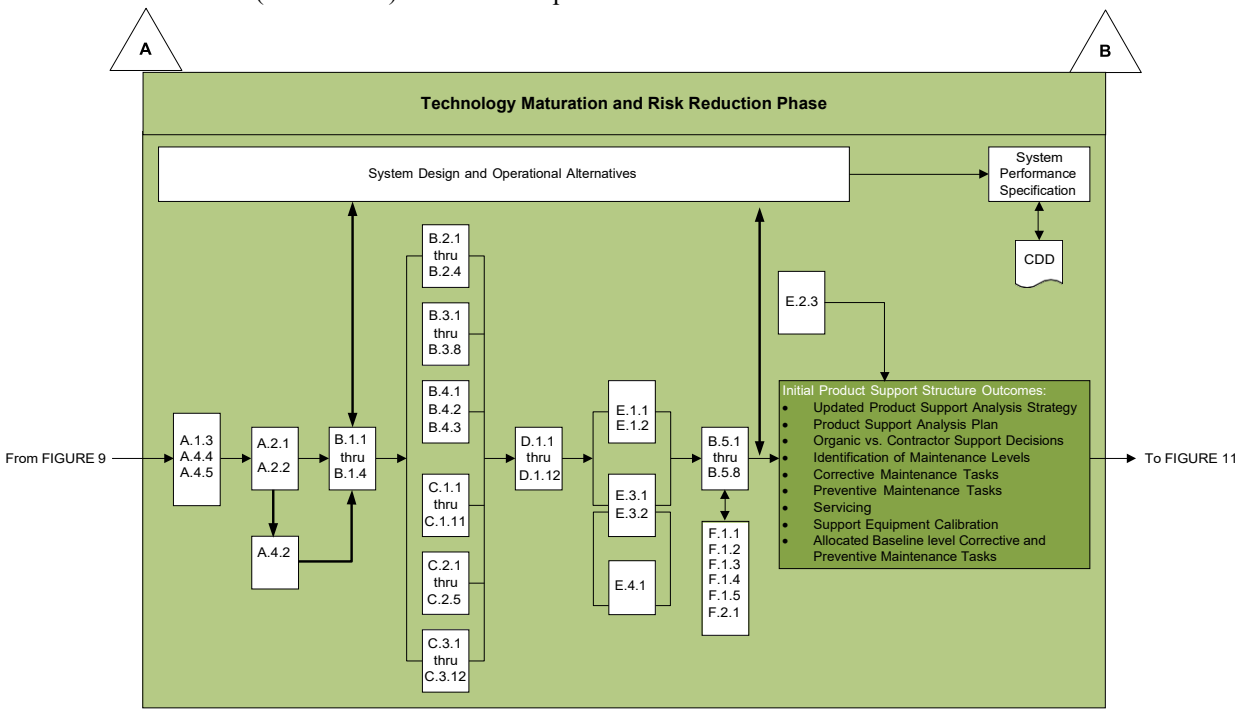


FIGURE 10. Conventional PSA process flow for TMRR phase

It should be noted that Activity A.3 is a management activity that is an integral part of the PSA process though not shown on FIGURE 10. Again, each one of the activities indicated by the boxes on FIGURE 10 can be tailored even further to fit program needs.

5.11.13.8 Conventional PSA Process Flow for the EMD Phase.

The EMD phase is initiated by a successful Milestone B decision and normally serves as the formal program initiation. Guided by the CDD, the purpose of the EMD phase is to develop the Product Support Package; complete the development of a system or increment of capability, leveraging design considerations; complete full system integration; develop affordable and executable manufacturing processes; and complete system fabrication, test and evaluation. A key emphasis during EMD is to ensure operational supportability with particular attention to minimizing the logistics footprint. Before proceeding beyond Milestone C, an approved CDD update is required.

5.11.13.8.1 Tailoring During the EMD Phase.

The activities conducted in the EMD phase mirror those conducted previously in the TMRR phase with the addition of Activity D.2. Activity D.2 is performed in parallel with Activity D.1 during the EMD phase. It should be noted that Activity A.3 is a management activity that is an integral part of the PSA process though

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not shown in FIGURE 11.

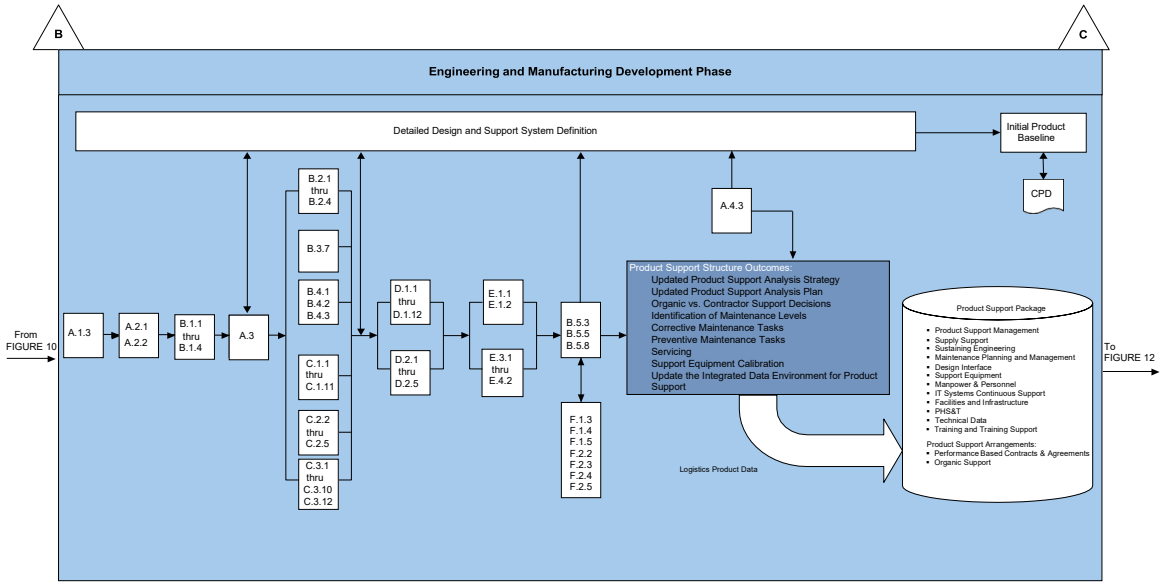


FIGURE 11. Conventional PSA process flow for EMD phase

5.11.13.9 Conventional PSA Process Flow for the P&D and O&S Phases.

The P&D phase is initiated by a successful Milestone C decision. With an approved CDD update, the P&D phase is designed to achieve an operational capability that satisfies the mission need. The P&D phase shares some activities with the subsequent O&S phase. The O&S phase is to execute a support program that meets materiel readiness and operational support performance requirements to sustain the system/equipment in the most cost-effective manner over its life cycle.

5.11.13.9.1 Tailoring during P&D and O&S Phases.

The process begins with an update to Activity B.2 followed by Activity B.5. Activities C.1, C.2, and D.1 are then conducted. Activities C.1 and D.1 also feed the logistics product database. The next Activities (C.3 and F.1) are performed in an iterative manner and provide updated information back to Activity C.1. This loop generated by the process flow from Activities C.1 through D.1, the iterations between C.3, F.1, and F.2, and the resulting update to Activity C.1.1, serves to not only keep the logistics product database current, but also to update the Product Support Package. In addition to updating the Product Support Package, this loop works to update the package as changes are made to the design of the system/equipment. Once the Product Support Package is finalized, the next set of parallel Activities (D.2 through E.4) can be completed. It should be noted that Activity A.3 is a management activity that is an integral part of the PSA process though not shown in FIGURE 12.

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Again, each one of the activities, indicated by the boxes in FIGURE 12, can be tailored even further to fit the program needs.

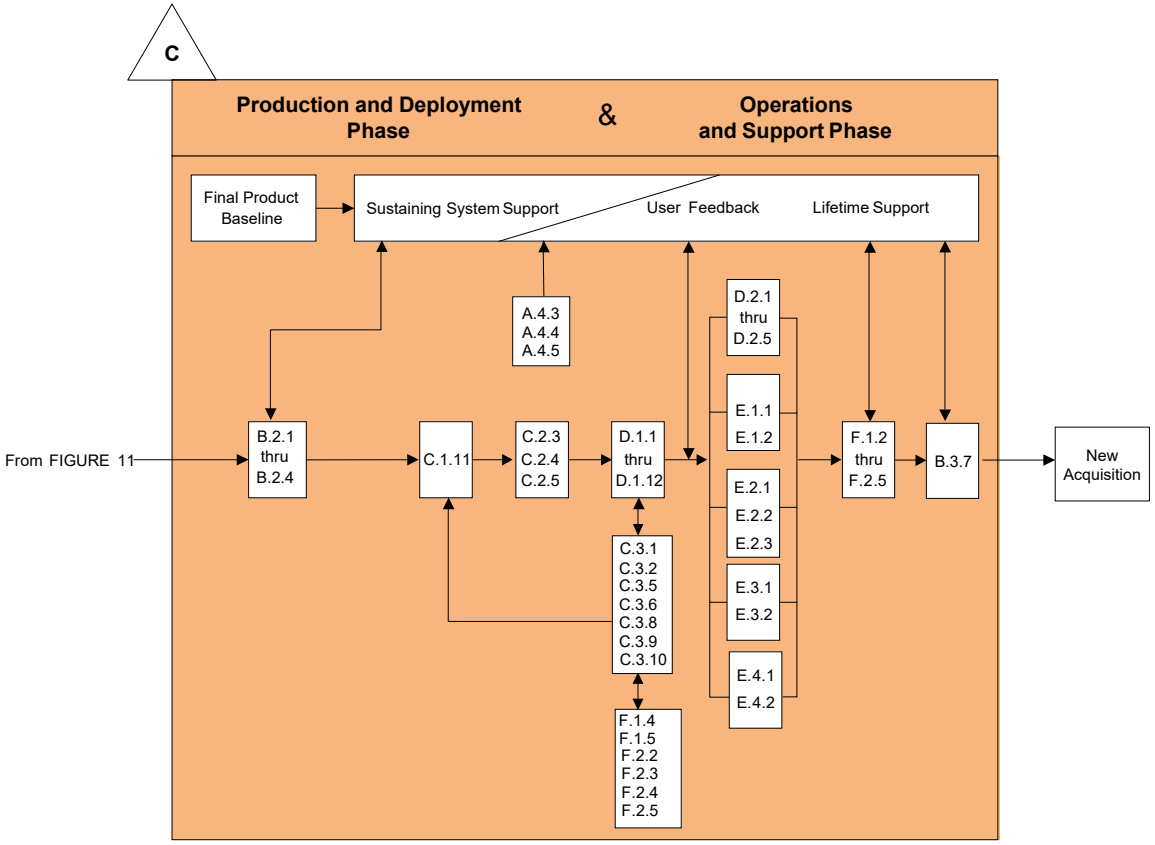


FIGURE 12. Conventional PSA process flow for P&D and O&S phase

5.11.14 Tailoring Specific Sub-Activities.

Selection of analysis requirements should take place at the sub-activity level since the sub-activities are generally written for specific phases and types of programs. The rationale for selecting particular sub-activities involves a wide range of considerations.

5.11.14.1 Activity Selection.

TABLES III - XXXII identify activities applicable by phase of development and engineering activity. The guidance in TABLES III - XXXII may require adjustment for specific acquisition programs since it is based on typical theoretical programs, and since it is not unusual for some aspects of a development program to be in one phase and other aspects in another. The determination of which activities to use requires more than an assessment of which analysis satisfies which PSA activities. The entire spectrum of the activity as it relates to the system under analysis and the intended location at which the activity will be used, should be evaluated. To aid in this process, 5.11.14.2 through 5.11.14.11 are provided as examples of what should be asked prior to a decision on which activity should be used.

5.11.14.2 Amount of Design Freedom.

The amount of design freedom is a key consideration in sub-activity selection. Design freedom is related to program considerations such as phasing. The objective of most of the front-end analysis sub-activities is to influence selection of design characteristics to achieve improvements in readiness, supportability, and cost. If the design is fixed, there may be little benefit in doing these activities. Product improvement might limit

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design freedom to specific subsystems unless areas of no or minor change are open to redesign opportunity to reduce product support burdens. Fast track programs tend to move up or back various possible analysis sub-activities, but these programs also tend to use existing technology and utilize preplanned product improvement rather than employ new technology. Design freedom may exist for the support system but not the mission system. PSA effort and objectives should be focused accordingly. The PSA objective of integrating supportability requirements into the design can best be achieved if designers are oriented toward supportability objectives. Technical information generated and documented during the design process will be disseminated among designers and supportability specialists to reveal interface problems between design concepts and operators, maintainers, and support equipment technicians. Technical design information such as diagnostic features, electro/mechanical interfaces, reliability estimates, item functions, adjustment requirements, and connector and pin assignments, which determines supportability, should be an integral part of design documentation. When design freedom exists, the performing activity's PSA plan should describe the generation, control, and approval of this type of information.

5.11.14.3 Work Already Performed.

Work already accomplished can impact sub-activity selection. Activities such as comparative analysis, cost and readiness driver identification, and improvement initiatives may have been included as inputs to the preparation of program initiation or other requirements documents. The quality of this work should be assessed. If adequate, it may need to be updated rather than completely revised. Likewise, program initiation or other requirements documents may prescribe objectives or constraints which tend to bound the scope of the analysis effort. However, it is essential to test the realism of such constraints or objectives and the analysis which supported these specifications prior to acceptance.

5.11.14.4 Assumptions and Constraints.

Assumptions are unvalidated factors that are thought to be true. Constraints can be business or technical in nature and are defined as restrictions or limitations on possible solutions. The budget, time restrictions, and technical architecture decisions are all examples of constraints. Assumptions add risk to a project and should be employed with caution until sufficient data exists to validate the assumptions. Assumptions can impact any part of the project life cycle and resulting solution implementation, so it is important to document and analyze them. Business constraints limit the solution based upon the current organizational state and usually focus on the available time, money and resources for a project. Common business constraints include budget and time restrictions, resource limitations, and resource skill limitations. Technical constraints often focus on decisions that limit the solution design. They tend to be inflexible and unchanging and can have an impact solution implementation. They include areas such as hardware, other infrastructure, and software that should be used for the project.

5.11.14.5 Limitations of the Activity.

Not all activities are performed in each phase of the life cycle. For example, Develop Potential Supportability Objectives, Activity A.1, is typically performed in the MSA phase or the TMRR phase. This task is not typically performed during the EMD phase or the P&D phase. Also, some activities are applied differently during different phases as data and documentation is updated through the life cycle. See 5.11.14.11, Focusing.

5.11.14.6 Quantity and Accuracy of Data/Documentation.

Documentation or recording of data should coincide with its generation in the design and analysis sequences that such this data will not have to be recreated at added expense at a later date. Delivery of data should be postponed until needed in order to receive the most mature version without repetitive updates. Additionally, availability and accuracy of data can be costly. For example, poorly prepared or inaccurate schematics will increase the cost of technical manuals.

5.11.14.7 Cost.

If program funds are limited, it may still be possible to perform some activities, such as early scoping of the analysis effort, comparative analysis, and driver identification, by use of in-house capabilities. Another possible approach is to capitalize on the interrelationships between some activities. For example, the comparative analysis feeds driver identification, which in turn feeds selection of targets for improvement. If

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for some reason only one of these activities could be funded, then the targets for improvement would be the logical pick of the three. Such an approach obviously loses precision since judgments are substituted for hard data on the deleted activities. It should, therefore, be employed only as a last resort. If the in-house capability is limited but funds are available, such activities might also be accomplished by "study" contractors with special expertise.

5.11.14.8 Past Experience and Historical Data.

The availability, accuracy, and relevancy of experience and historical databases on similar existing systems is crucial for accomplishment of some activities in this standard. Available databases should be examined to determine if extensive work is needed to provide focus or relevancy. If such databases are not available, a special "sample data" effort should be considered.

5.11.14.9 Time and Resources Available.

To influence design, product support analyses require time and resources. Do not specify an activity whose results would not be available in time to affect design unless the potential improvement can be scheduled as part of a preplanned product improvement. "Fast track" programs, as their name implies, tend to reduce the time to do "design influence" analysis activities. A possible offset to time restrictions is the accomplishment of some analysis activity off-line as "off-the-shelf" assets to be employed at the appropriate time. The accomplishment of "design influence" product support analyses requires resources in the form of people and money. It is DoD policy to fund readiness and support considerations in the front end of programs. Nevertheless, resources are constrained in practice.

5.11.14.10 Contracting Considerations.

The requiring authority should initially decide and specify the PSA activities that are to be done solely by the government or independent agency, those that are to be shared between the government and the system/equipment developer, and those that are to be performed solely by the system/equipment developer. Once done, the PSA portion of the contracting plan can be developed, and work requirements written into the procurement documentation. It is very useful to allow the prospective performing activities, under the bidding terms of the procurement, to recommend adding or deleting PSA activities and to provide a more detailed activity definition and schedule. Additionally, prospective performing activities should be encouraged to make use of cost-effective data generation procedures. The prospective performing activity's tailoring process and cost reduction efforts should become a factor in the assessment of its capability to perform the PSA program. Acquisition program objectives should be considered in preparing procurement documents. For example, in a technology demonstration procurement, one may specifically exclude certain PSA activity requirements. Supportability objectives for this type of procurement would best be served through design influence and generation of a PSA database for subsequent detailed analysis effort when the technology is utilized. If the acquisition program is oriented to develop and procure a system/equipment, then other PSA activities become equally important. The nature of the procurement may force the performing activity to do some analysis activity to make a rational bid. More procurement considerations are discussed in Section 0.

5.11.14.11 Focusing.

After the initial selection of activities is completed, further focusing is needed to concentrate effort in high leverage areas and to specify other requirements. Often 10-20% of the subsystems control 80-90% of the support demands. Some Activity C.3 evaluations and tradeoffs are very general and would benefit from greater specificity to focus on key areas. Models and definitions, particularly for life cycle cost, to be used for a particular analysis should be specified, if possible, especially if there is competition. Considerations under focusing should include:

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a. Modification or restriction of the sub-activity to significant areas.

b. Specification of sub-activities such that they can easily be assigned to the most appropriate community.

c. Specification of models and associated data to be used.

d. Specification of areas or activity requiring requester approval. The requiring authority should be as specific as possible in defining analysis needs for activities under the activity input to be specified.

5.11.14.12 Activity Tailoring Decision Guide.

FIGURE 13 portrays a general tailoring logic tree which should be followed in selecting activities. The initial selection of activities can be adjusted for design freedom and time phasing adjustments if program is "fast track."

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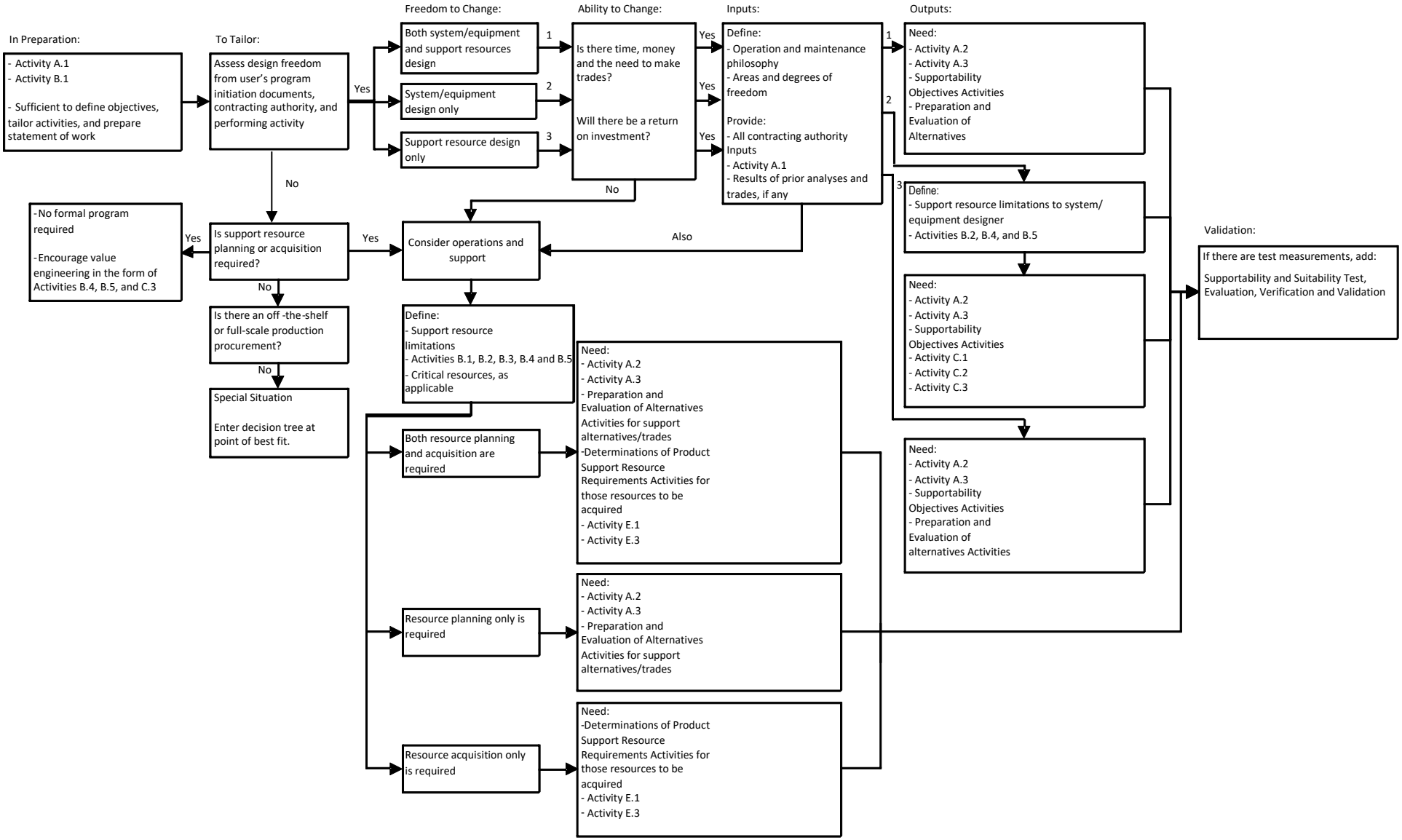


FIGURE 13. Activity tailoring decision guide

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5.11.15 Tailoring Tables.

TABLE III - TABLE XXXII are matrices to enable the government to determine which Product Support Analyses the contractor will execute for a particular system depending on the type of acquisition and life cycle phase. These tables are a starting point. Again, the government should evaluate every input, criteria, complexity, cost, timing, and output of each activity and sub-activity to identify activities that are necessary or not, depending on program needs.

5.11.15.1 Understanding the Tailoring Tables.

On the left-hand side of the matrix are the PSA activities. On the top of the matrix is the type of acquisition: modification, commercial item, non-development item and a development item. Each table is divided into the phase of the life cycle: MSA, TMRR, EMD, and O&S. Based on the acquisition, life cycle phase, and activity, two letters will be displayed. The first letter will indicate if the activity should be performed. The second letter indicates who is the overall responsible entity for performing the activity. The letter “E” indicates the activities are “essential” in performing. The letters “NR” indicates the activities are “not required”. The letter “T” indicates the activity is “tailorable” and the government individual requirements will determine if the activity will be performed. The letter “C” indicates that the contractor is responsible for the activity and that activity will be placed on contract. The letter “G” indicates that the government is responsible for the activity. The letter "O" indicates that either the government or contractor will perform activity depending on the situation. The letter "J" indicates that both the government and contractor will perform the activity together. To help illustrate tailoring of the activities using the tables for guidance, we have provided a few in the proceeding paragraphs.

5.11.15.2 Activity Selection for PSA Management, Surveillance, and Control.

TABLE III - TABLE VII are provided to guide users through choosing activities during PSA management, surveillance, and control.

5.11.15.2.1 Activity Tailoring Example 1.

At the beginning of any system (modification, commercial item, non-developmental item, or developmental item) it is essential that the PSS is developed. Initially, the potential supportability objectives are developed (Activity A.1.1), Cost Drivers are identified (Activity A.1.2), and the PSS is updated (Activity A.1.3). The outputs of these activities are extremely valuable in developing the PSS. As an example, imagine the modification of an existing system, and a contract to provide supportability is being written. TABLE III would be referenced to see if a PSS is necessary for a modification and who would perform Activity A.1, Product Support Strategy. Looking at TABLE III and TABLE IV, it can be seen that Activities A.1.1 through A.1.3 are all essential as indicated by the “E” next to the activity. Activities A.1.1 and A.1.2 are performed by the government as indicated by the “G”. The table indicates that later in the MSA phase, Activity A.1.3, Update the Product Support Strategy, while essential, it is typically performed by both government and contractor as indicated by the “J” (Joint).

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TABLE III. PSA management, surveillance, and control in the MSA phase (Activities A.1 through A.4)

MATERIEL SOLUTION ANALYSIS PHASE					
ACTIVITY	PSA MANAGEMENT, SURVEILLANCE, & CONTROL ACTIVITIES	MOD	COM	NDI	DEV
A.1	PRODUCT SUPPORT STRATEGY				
A.1.1	Develop Supportability Objectives	E, G	E, G	E, G	E, G
A.1.2	Identification and Measurement of Cost Drivers	E, G	E, G	E, G	E, G
A.1.3	Update the Product Support Strategy	E, J	E, J	E, J	E, J
A.2	PRODUCT SUPPORT ANALYSIS PLANNING				
A.2.1	Product Support Analysis Plan (PSAP)	NR	NR	NR	E, G
A.2.2	Plan Update	NR	NR	NR	NR
A.3	PROGRAM AND DESIGN REVIEWS				
A.3.1	Design Review Procedures	T, G	T, G	T, G	T, G
A.3.2	Design Review	E, G	E, G	E, G	E, G
A.3.3	Program Reviews	T, G	T, G	T, G	T, G
A.3.4	Technical Interchange Meetings	T, G	T, G	T, G	T, G
A.4	INTEGRATED DATA ENVIRONMENT FOR PRODUCT SUPPORT (IDE-PS)				
A.4.1	Examine Stakeholder Information Environments	E, J	NR	NR	E, G
A.4.2	Create the Integrated Data Environment for Product Support	E, J	NR	NR	T, G
A.4.3	Update the Integrated Data Environment for Product Support	T, J	NR	NR	T, G
A.4.4	DevSecOps	E, G	T, O	T, O	T, G
A.4.5	Digital Thread	E, G	NR	NR	T, G
E-ESSENTIAL, NR-NOT REQUIRED, T-TAILORABLE, G-GOVERNMENT, C-CONTRACTOR, O-EITHER GOVERNMENT OR CONTRACTOR, J-JOINT GOVERNMENT AND CONTRACTOR, MOD-MODIFICATION, COM-COMMERCIAL ITEM, NDI-NON-DEVELOPMENTAL ITEM, DEV DEVELOPMENT					

5.11.15.2.2 Activity Tailoring Example 2.

As a program enters the TMRR phase, on a modification of an existing system, the Logistics Engineer (LE) may require a PSAP (Activity A.2.1). The PSAP describes how the PSA program will be conducted to meet program requirements. However, it may not be prudent to require a PSAP for a modification; the existing PSAP for the initial development maybe sufficient or the modification may not be significant enough to warrant a new PSAP. In this case, the LE would not place activity A.2.1 on contract and may instead require an updated PSAP, (Activity A.2.2) Using the tailoring TABLE IV, it can be seen that in the TMRR phase, under MOD (modification), a “T” and “C” are in the row next to PSAP and Update PSAP. The “T” indicates this activity is tailorable and the C indicates the contractor typically performs this activity.

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TABLE IV. PSA management, surveillance, and control in the TMRR phase (Activities A.1 through A.4)

TECHNOLOGY MATURATION AND RISK REDUCTION PHASE					
ACTIVITY	PSA MANAGEMENT, SURVEILLANCE, & CONTROL ACTIVITIES	MOD	COM	NDI	DEV
A.1	PRODUCT SUPPORT STRATEGY				
A.1.1	Develop Supportability Objectives	NR	NR	NR	NR
A.1.2	Identification and Measurement of Cost Drivers	NR	NR	NR	NR
A.1.3	Update the Product Support Strategy	E, G	E, J	E, O	E, J
A.2	PRODUCT SUPPORT ANALYSIS PLANNING				
A.2.1	Product Support Analysis Plan (PSAP)	T, C	NR	NR	T, C
A.2.2	Plan Update	T, C	NR	NR	T, C
A.3	PROGRAM AND DESIGN REVIEWS				
A.3.1	Design Review Procedures	T, O	T, O	T, O	T, O
A.3.2	Design Review	T, J	T, J	T, C	T, J
A.3.3	Program Reviews	T, J	T, J	T, J	T, J
A.3.4	Technical Interchange Meetings	T, J	T, J	T, J	T, J
A.4	INTEGRATED DATA ENVIRONMENT FOR PRODUCT SUPPORT (IDE-PS)				
A.4.1	Examine Stakeholder Information Environments	NR	NR	NR	NR
A.4.2	Create the Integrated Data Environment for Product Support	T, J	NR	NR	T, J
A.4.3	Update the Integrated Data Environment for Product Support	T, J	NR	NR	T, J
A.4.4	DevSecOps	T, O	T, O	T, O	T, O
A.4.5	Digital Thread	T, O	T, O	T, O	T, O
E-ESSENTIAL, NR-NOT REQUIRED, T-TAILORABLE, G-GOVERNMENT, C-CONTRACTOR, O-EITHER GOVERNMENT OR CONTRACTOR, J-JOINT GOVERNMENT AND CONTRACTOR, MOD-MODIFICATION, COM-COMMERCIAL ITEM, NDI-NON-DEVELOPMENTAL ITEM, DEV DEVELOPMENT					

5.11.15.2.3 Activity Tailoring Example 3.

Continuing the example of a modification to an existing system, consider a contract being written for the EMD phase. A determination is needed for the Program and Design Review that should be performed. The Program and Design Reviews establish a requirement for the contractor to plan and provide for official review and control of released design information with PSA program participation in a timely and controlled manner. Also to ensure that the PSA program is proceeding in accordance with the contractual milestones so that the supportability and supportability related design requirements will be achieved. Design Review procedures (Activity A.3.1) establish and document design review procedures (where procedures do not already exist) which provide for official review and control of released design information with PSA program participation in a timely and controlled manner. For the example modification, current Design Review Procedures may be sufficient and may not require changes. However, Design Reviews, Supportability and Supportability Related Design Reviews and especially PSA Technical Interchange Meetings (Activities A.3.1 through A.3.4) may be needed in identifying any changes to the product support and to ensure the system is in track for schedule, cost and performance. In Table V, under the MOD column, Activities A.3.1 – A.3.4 are tailorable as indicated by the “T”. Additionally, Activity A.3.1, Design Review Procedures, when performed is typically executed by either government or contractor – “O”. However, for Activities A.3.2 – A.3.4, the government plays are larger role since they are performed jointly by the government and contractor.

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Table V. PSA management, surveillance, and control in the EMD phase (Activities A.1 through A.4)

ENGINEERING & MANUFACTURING DEV PHASE					
ACTIVITY	PSA MANAGEMENT, SURVEILLANCE, & CONTROL ACTIVITIES	MOD	COM	NDI	DEV
A.1	PRODUCT SUPPORT STRATEGY				
A.1.1	Develop Supportability Objectives	NR	NR	NR	NR
A.1.2	Identification and Measurement of Cost Drivers	NR	NR	NR	NR
A.1.3	Update the Product Support Strategy	T, J	T, J	T, J	T, J
A.2	PRODUCT SUPPORT ANALYSIS PLANNING				
A.2.1	Product Support Analysis Plan (PSAP)	NR	NR	NR	T, C
A.2.2	Plan Update	T, C	NR	NR	T, C
A.3	PROGRAM AND DESIGN REVIEWS				
A.3.1	Design Review Procedures	T, O	NR	NR	T, O
A.3.2	Design Review	T, J	T, J	T, J	T, J
A.3.3	Program Reviews	T, J	NR	NR	T, J
A.3.4	Technical Interchange Meetings	T, J	T, J	T, J	T, J
A.4	INTEGRATED DATA ENVIRONMENT FOR PRODUCT SUPPORT (IDE-PS)				
A.4.1	Examine Stakeholder Information Environments	NR	NR	NR	NR
A.4.2	Create the Integrated Data Environment for Product Support	NR	NR	NR	NR
A.4.3	Update the Integrated Data Environment for Product Support	T, J	NR	NR	T, J
A.4.4	DevSecOps	T, O	T, O	T, O	T, O
A.4.5	Digital Thread	T, O	T, O	T, O	T, O
E-ESSENTIAL, NR-NOT REQUIRED, T-TAILORABLE, G-GOVERNMENT, C-CONTRACTOR, O-EITHER GOVERNMENT OR CONTRACTOR, J-JOINT GOVERNMENT AND CONTRACTOR, MOD-MODIFICATION, COM-COMMERCIAL ITEM, NDI-NON-DEVELOPMENTAL ITEM, DEV DEVELOPMENT					

TABLE VI. PSA management, surveillance, and control in the P&D phase (Activities A.1 through A. 4)

PRODUCTION & DEPLOYMENT PHASE					
ACTIVITY	PSA MANAGEMENT, SURVEILLANCE, & CONTROL ACTIVITIES	MOD	COM	NDI	DEV
A.1	PRODUCT SUPPORT STRATEGY				
A.1.1	Develop Supportability Objectives	NR	NR	NR	NR
A.1.2	Identification and Measurement of Cost Drivers	NR	NR	NR	NR
A.1.3	Update the Product Support Strategy	T, J	T, J	T, J	T, J
A.2	PRODUCT SUPPORT ANALYSIS PLANNING				
A.2.1	Product Support Analysis Plan (PSAP)	NR	NR	NR	T, C
A.2.2	Plan Update	T, C	NR	NR	T, C
A.3	PROGRAM AND DESIGN REVIEWS				
A.3.1	Design Review Procedures	T, O	NR	NR	T, O
A.3.2	Design Review	T, J	T, J	T, J	T, J
A.3.3	Program Reviews	T, J	NR	NR	T, J
A.3.4	Technical Interchange Meetings	T, J	T, J	T, J	T, J
A.4	INTEGRATED DATA ENVIRONMENT FOR PRODUCT SUPPORT (IDE-PS)				
A.4.1	Examine Stakeholder Information Environments	NR	NR	NR	NR
A.4.2	Create the Integrated Data Environment for Product Support	NR	NR	NR	NR
A.4.3	Update the Integrated Data Environment for Product Support	T, J	NR	NR	T, J
A.4.4	DevSecOps	T, O	T, O	T, O	T, O
A.4.5	Digital Thread	T, O	T, O	T, O	T, O
E-ESSENTIAL, NR-NOT REQUIRED, T-TAILORABLE, G-GOVERNMENT, C-CONTRACTOR, O-EITHER GOVERNMENT OR CONTRACTOR, J-JOINT GOVERNMENT AND CONTRACTOR, MOD-MODIFICATION, COM-COMMERCIAL ITEM, NDI-NON-DEVELOPMENTAL ITEM, DEV DEVELOPMENT					

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TABLE VII. PSA management, surveillance, and control in the O&S phase (Activities A.1 through A.4)

OPERATIONS & SUPPORT PHASE					
ACTIVITY	PSA MANAGEMENT, SURVEILLANCE, & CONTROL ACTIVITIES	MOD	COM	NDI	DEV
A.1	PRODUCT SUPPORT STRATEGY				
A.1.1	Develop Supportability Objectives	NR	NR	NR	NR
A.1.2	Identification and Measurement of Cost Drivers	NR	NR	NR	NR
A.1.3	Update the Product Support Strategy	T, J	NR	NR	T, J
A.2	PRODUCT SUPPORT ANALYSIS PLANNING				
A.2.1	Product Support Analysis Plan (PSAP)	NR	NR	NR	T, C
A.2.2	Plan Update	T, C	NR	NR	T, C
A.3	PROGRAM AND DESIGN REVIEWS				
A.3.1	Design Review Procedures	NR	NR	NR	NR
A.3.2	Design Review	NR	NR	NR	NR
A.3.3	Program Reviews	NR	NR	NR	NR
A.3.4	Technical Interchange Meetings	NR	NR	NR	NR
A.4	INTEGRATED DATA ENVIRONMENT FOR PRODUCT SUPPORT (IDE-PS)				
A.4.1	Examine Stakeholder Information Environments	NR	NR	NR	NR
A.4.2	Create the Integrated Data Environment for Product Support	NR	NR	NR	NR
A.4.3	Update the Integrated Data Environment for Product Support	T, J	NR	NR	T, O
A.4.4	DevSecOps	T, O	T, O	T, O	T, O
A.4.5	Digital Thread	T, O	T, O	T, O	T, O
E-ESSENTIAL, NR-NOT REQUIRED, T-TAILORABLE, G-GOVERNMENT, C-CONTRACTOR, O-EITHER GOVERNMENT OR CONTRACTOR, J-JOINT GOVERNMENT AND CONTRACTOR, MOD-MODIFICATION, COM-COMMERCIAL ITEM, NDI-NON-DEVELOPMENTAL ITEM, DEV DEVELOPMENT					

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5.11.15.3 Activity selection for supportability objectives.

TABLE VIII - TABLE XII are provided to guide users through choosing activities for supportability objectives.

TABLE VIII. Supportability objectives in the MSA phase (Activities B.1 through B.5)

MATERIEL SOLUTION ANALYSIS PHASE					
ACTIVITY	SUPPORTABILITY OBJECTIVES ACTIVITIES	MOD	COM	NDI	DEV
B.1	APPLICATION AND USAGE ASSESSMENT				
B.1.1	Intended Use/Capabilities	E, G	E, G	E, G	E, G
B.1.2	Quantitative Factors	E, G	E, G	E, G	E, G
B.1.3	Field Visits	E, O	E, O	E, O	E, O
B.1.4	Intended Use/Capabilities Report	E, O	E, O	E, O	E, O
B.2	SUPPORT SYSTEM STANDARDIZATION				
B.2.1	Support Resource Standardization	E, G	E, G	E, G	E, G
B.2.2	Standardization Costs	E, G	E, G	E, G	E, G
B.2.3	Hardware/Software Standardization Approaches	E, G	E, G	E, G	E, G
B.2.4	Standardization Risks	E, G	E, G	E, G	E, G
B.3	COMPARATIVE ANALYSIS				
B.3.1	Comparative Products	E, O	E, G	E, G	E, G
B.3.2	Baseline Comparative System (BCS)	E, O	E, G	E, G	E, G
B.3.3	BCS Logistics Requirements	E, O	E, G	E, G	E, G
B.3.4	BCS Qualitative Constraints	E, O	E, G	E, G	E, G
B.3.5	BCS Supportability, Costs, and Readiness Drivers	E, O	E, G	E, G	E, G
B.3.6	Unique System Drivers	E, O	E, G	E, G	E, G
B.3.7	BCS Updates	E, O	E, G	E, G	E, G
B.3.8	BCS Risks	E, O	E, G	E, G	E, G
B.4	TECHNOLOGICAL OPPORTUNITIES				
B.4.1	Identify Potential Technology	E, J	E, J	E, J	E, J
B.4.2	Update Design Objectives	E, J	E, J	E, J	E, J
B.4.3	Technology Risks	E, J	E, J	E, J	E, J
B.5	SUPPORTABILITY AND SUPPORTABILITY-RELATED DESIGN FACTORS				
B.5.1	Supportability Characteristics	E, O	E, O	E, O	E, O
B.5.2	Sensitivity Analysis	E, O	E, O	E, O	E, O
B.5.3	Intellectual Property (IP) and Data Rights	E, J	E, J	E, J	E, O
B.5.4	Identify Risks	E, G	E, G	E, G	E, G
B.5.5	Key Performance Parameters	NR	E, G	E, G	NR
B.5.6	Market Limitations	E, G	E, G	E, G	E, G
B.5.7	Update Objectives, Goals, and Thresholds	NR	E, O	E, G	NR
B.5.8	Advanced Manufacturing	E, O	E, O	E, O	E, O
E-ESSENTIAL, NR-NOT REQUIRED, T-TAILORABLE, G-GOVERNMENT, C-CONTRACTOR, O-EITHER GOVERNMENT OR CONTRACTOR, J-JOINT GOVERNMENT AND CONTRACTOR, MOD-MODIFICATION, COM-COMMERCIAL ITEM, NDI-NON-DEVELOPMENTAL ITEM, DEV DEVELOPMENT					

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TABLE IX. Supportability objectives in the TMRR phase (Activities B.1 through B.5)

TECHNOLOGY MATURATION AND RISK REDUCTION PHASE					
ACTIVITY	SUPPORTABILITY OBJECTIVES ACTIVITIES	MOD	COM	NDI	DEV
B.1	APPLICATION AND USAGE ASSESSMENT				
B.1.1	Intended Use/Capabilities	E, G	NR	NR	E, G
B.1.2	Quantitative Factors	E, G	NR	NR	E, G
B.1.3	Field Visits	E, O	NR	NR	E, O
B.1.4	Intended Use/Capabilities Report	E, O	NR	NR	E, O
B.2	SUPPORT SYSTEM STANDARDIZATION				
B.2.1	Support Resource Standardization	T, C	NR	T, C	E, O
B.2.2	Standardization Costs	T, C	NR	T, C	E, O
B.2.3	Hardware/Software Standardization Approaches	T, C	NR	T, C	E, O
B.2.4	Standardization Risks	T, C	NR	T, C	E, O
B.3	COMPARATIVE ANALYSIS				
B.3.1	Comparative Products	E, G	NR	NR	E, C
B.3.2	Baseline Comparative System (BCS)	E, G	NR	NR	E, C
B.3.3	BCS Logistics Requirements	E, G	NR	NR	E, C
B.3.4	BCS Qualitative Constraints	E, G	NR	NR	E, C
B.3.5	BCS Supportability, Costs, and Readiness Drivers	E, G	NR	NR	E, C
B.3.6	Unique System Drivers	E, G	NR	NR	E, C
B.3.7	BCS Updates	E, G	NR	NR	E, C
B.3.8	BCS Risks	E, G	NR	NR	E, C
B.4	TECHNOLOGICAL OPPORTUNITIES				
B.4.1	Identify Potential Technology	E, J	E, J	E, J	E, J
B.4.2	Update Design Objectives	E, J	E, J	E, J	E, J
B.4.3	Technology Risks	E, J	E, J	E, J	E, J
B.5	SUPPORTABILITY AND SUPPORTABILITY-RELATED DESIGN FACTORS				
B.5.1	Supportability Characteristics	E, O	NR	NR	E, O
B.5.2	Sensitivity Analysis	E, O	NR	NR	E, O
B.5.3	Intellectual Property (IP) and Data Rights	E, J	E, G	E, G	E, J
B.5.4	Identify Risks	E, G	NR	NR	E, G
B.5.5	Key Performance Parameters	E, G	NR	NR	E, G
B.5.6	Market Limitations	E, G	NR	NR	E, G
B.5.7	Update Objectives, Goals, and Thresholds	E, G	NR	NR	E, G
B.5.8	Advanced Manufacturing	E, O	E, O	E, O	E, O
E-ESSENTIAL, NR-NOT REQUIRED, T-TAILORABLE, G-GOVERNMENT, C-CONTRACTOR, O-EITHER GOVERNMENT OR CONTRACTOR, J-JOINT GOVERNMENT AND CONTRACTOR, MOD-MODIFICATION, COM-COMMERCIAL ITEM, NDI-NON-DEVELOPMENTAL ITEM, DEV DEVELOPMENT					

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TABLE X. Supportability objectives in the EMD phase (Activities B.1 through B.5)

ENGINEERING & MANUFACTURING DEVELOPMENT PHASE					
ACTIVITY	SUPPORTABILITY OBJECTIVES ACTIVITIES	MOD	COM	NDI	DEV
B.1	APPLICATION AND USAGE ASSESSMENT				
B.1.1	Intended Use/Capabilities	T, O	NR	NR	T, O
B.1.2	Quantitative Factors	T, O	NR	NR	T, O
B.1.3	Field Visits	T, O	NR	NR	T, O
B.1.4	Intended Use/Capabilities Report	T, O	NR	NR	T, O
B.2	SUPPORT SYSTEM STANDARDIZATION				
B.2.1	Support Resource Standardization	T, C	NR	NR	T, C
B.2.2	Standardization Costs	T, C	NR	NR	T, C
B.2.3	Hardware/Software Standardization Approaches	T, C	NR	NR	T, C
B.2.4	Standardization Risks	T, C	NR	NR	T, C
B.3	COMPARATIVE ANALYSIS				
B.3.1	Comparative Products	NR	NR	NR	NR
B.3.2	Baseline Comparative System (BCS)	NR	NR	NR	NR
B.3.3	BCS Logistics Requirements	NR	NR	NR	NR
B.3.4	BCS Qualitative Constraints	NR	NR	NR	NR
B.3.5	BCS Supportability, Costs, and Readiness Drivers	NR	NR	NR	NR
B.3.6	Unique System Drivers	NR	NR	NR	NR
B.3.7	BCS Updates	T, C	NR	NR	T, C
B.3.8	BCS Risks	T, C	NR	NR	T, C
B.4	TECHNOLOGICAL OPPORTUNITIES				
B.4.1	Identify Potential Technology	T, C	NR	NR	T, C
B.4.2	Update Design Objectives	T, C	NR	NR	T, C
B.4.3	Technology Risks	T, C	NR	NR	T, C
B.5	SUPPORTABILITY AND SUPPORTABILITY-RELATED DESIGN FACTORS				
B.5.1	Supportability Characteristics	NR	NR	NR	NR
B.5.2	Sensitivity Analysis	NR	NR	NR	NR
B.5.3	Intellectual Property (IP) and Data Rights	E, J	E, J	E, J	E, J
B.5.4	Identify Risks	NR	NR	NR	NR
B.5.5	Key Performance Parameters	T, J	T, J	T, J	T, J
B.5.6	Market Limitations	NR	NR	NR	NR
B.5.7	Update Objectives, Goals, and Thresholds	NR	NR	NR	NR
B.5.8	Advanced Manufacturing	E, J	E, J	E, J	E, J
E-ESSENTIAL, NR-NOT REQUIRED, T-TAILORABLE, G-GOVERNMENT, C-CONTRACTOR, O-EITHER GOVERNMENT OR CONTRACTOR, J-JOINT GOVERNMENT AND CONTRACTOR, MOD-MODIFICATION, COM-COMMERCIAL ITEM, NDI-NON-DEVELOPMENTAL ITEM, DEV DEVELOPMENT					

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TABLE XI. Supportability objectives in the P&D phase (Activities B.1 through B.5)

PRODUCTION & DEPLOYMENT PHASE					
ACTIVITY	SUPPORTABILITY OBJECTIVES ACTIVITIES	MOD	COM	NDI	DEV
B.1	APPLICATION AND USAGE ASSESSMENT				
B.1.1	Intended Use/Capabilities	NR	NR	NR	NR
B.1.2	Quantitative Factors	NR	NR	NR	NR
B.1.3	Field Visits	NR	NR	NR	NR
B.1.4	Intended Use/Capabilities Report	NR	NR	NR	NR
B.2	SUPPORT SYSTEM STANDARDIZATION				
B.2.1	Support Resource Standardization	T, C	NR	NR	T, C
B.2.2	Standardization Costs	T, C	NR	NR	T, C
B.2.3	Hardware/Software Standardization Approaches	T, C	NR	NR	T, C
B.2.4	Standardization Risks	T, C	NR	NR	T, C
B.3	COMPARATIVE ANALYSIS				
B.3.1	Comparative Products	NR	NR	NR	NR
B.3.2	Baseline Comparative System (BCS)	NR	NR	NR	NR
B.3.3	BCS Logistics Requirements	NR	NR	NR	NR
B.3.4	BCS Qualitative Constraints	NR	NR	NR	NR
B.3.5	BCS Supportability, Costs, and Readiness Drivers	NR	NR	NR	NR
B.3.6	Unique System Drivers	NR	NR	NR	NR
B.3.7	BCS Updates	NR	NR	NR	T, O
B.3.8	BCS Risks	NR	NR	NR	NR
B.4	TECHNOLOGICAL OPPORTUNITIES				
B.4.1	Identify Potential Technology	NR	NR	NR	NR
B.4.2	Update Design Objectives	NR	NR	NR	NR
B.4.3	Technology Risks	NR	NR	NR	NR
B.5	SUPPORTABILITY AND SUPPORTABILITY-RELATED DESIGN FACTORS				
B.5.1	Supportability Characteristics	NR	NR	NR	NR
B.5.2	Sensitivity Analysis	NR	NR	NR	NR
B.5.3	Intellectual Property (IP) and Data Rights	E, J	E, J	E, J	T, J
B.5.4	Identify Risks	NR	NR	NR	NR
B.5.5	Key Performance Parameters	NR	NR	NR	NR
B.5.6	Market Limitations	NR	NR	NR	NR
B.5.7	Update Objectives, Goals, and Thresholds	NR	NR	NR	NR
B.5.8	Advanced Manufacturing	E, O	E, O	E, O	T, O

E-ESSENTIAL, NR-NOT REQUIRED, T-TAILORABLE, G-GOVERNMENT, C-CONTRACTOR, O-EITHER GOVERNMENT OR CONTRACTOR, J-JOINT GOVERNMENT AND CONTRACTOR, MOD-MODIFICATION, COM-COMMERCIAL ITEM, NDI-NON-DEVELOPMENTAL ITEM, DEV DEVELOPMENT

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TABLE XII. Supportability objectives in the O&S phase (Activities B.1 through B.5)

OPERATIONS & SUPPORT PHASE					
ACTIVITY	SUPPORTABILITY OBJECTIVES ACTIVITIES	MOD	COM	NDI	DEV
B.1	APPLICATION AND USAGE ASSESSMENT				
B.1.1	Intended Use/Capabilities	NR	NR	NR	NR
B.1.2	Quantitative Factors	NR	NR	NR	NR
B.1.3	Field Visits	T, G	NR	NR	T, G
B.1.4	Intended Use/Capabilities Report	NR	NR	NR	NR
B.2	SUPPORT SYSTEM STANDARDIZATION				
B.2.1	Support Resource Standardization	T, C	NR	NR	T, C
B.2.2	Standardization Costs	T, C	NR	NR	T, C
B.2.3	Hardware/Software Standardization Approaches	T, C	NR	NR	T, C
B.2.4	Standardization Risks	T, C	NR	NR	T, C
B.3	COMPARATIVE ANALYSIS				
B.3.1	Comparative Products	NR	NR	NR	NR
B.3.2	Baseline Comparative System (BCS)	NR	NR	NR	NR
B.3.3	BCS Logistics Requirements	NR	NR	NR	NR
B.3.4	BCS Qualitative Constraints	NR	NR	NR	NR
B.3.5	BCS Supportability, Costs, and Readiness Drivers	NR	NR	NR	NR
B.3.6	Unique System Drivers	NR	NR	NR	NR
B.3.7	BCS Updates	NR	NR	NR	NR
B.3.8	BCS Risks	NR	NR	NR	NR
B.4	TECHNOLOGICAL OPPORTUNITIES				
B.4.1	Identify Potential Technology	NR	NR	NR	NR
B.4.2	Update Design Objectives	NR	NR	NR	NR
B.4.3	Technology Risks	NR	NR	NR	NR
B.5	SUPPORTABILITY AND SUPPORTABILITY-RELATED DESIGN FACTORS				
B.5.1	Supportability Characteristics	NR	NR	NR	NR
B.5.2	Sensitivity Analysis	NR	NR	NR	NR
B.5.3	Intellectual Property (IP) and Data Rights	NR	NR	NR	NR
B.5.4	Identify Risks	NR	NR	NR	NR
B.5.5	Key Performance Parameters	NR	NR	NR	NR
B.5.6	Market Limitations	NR	NR	NR	NR
B.5.7	Update Objectives, Goals, and Thresholds	NR	NR	NR	NR
B.5.8	Advanced Manufacturing	NR	NR	NR	NR
E-ESSENTIAL, NR-NOT REQUIRED, T-TAILORABLE, G-GOVERNMENT, C-CONTRACTOR, O-EITHER GOVERNMENT OR CONTRACTOR, J-JOINT GOVERNMENT AND CONTRACTOR, MOD-MODIFICATION, COM-COMMERCIAL ITEM, NDI-NON-DEVELOPMENTAL ITEM, DEV DEVELOPMENT					

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5.11.15.4 Activity Selection for Preparation and Evaluation of Alternatives.

TABLE XIII - TABLE XVII are provided to guide users through choosing activities for preparation and evaluation of alternatives.

TABLE XIII. Preparation and evaluation of alternatives in the MSA phase (Activities C.1 through C.3)

MATERIEL SOLUTION ANALYSIS PHASE					
ACTIVITY	PREPARATION AND EVALUATION OF ALTERNATIVE ACTIVITIES	MOD	COM	NDI	DEV
C.1	FUNCTIONAL REQUIREMENTS				
C.1.1	Functional Requirement Identification	E, G	NR	NR	E, G
C.1.2	Unique Item Functions	E, G	NR	NR	E, G
C.1.3	Function Drivers	E, G	NR	NR	E, G
C.1.4	Function Risks	T, G	NR	NR	T, G
C.1.5	Failure Modes and Effects Analysis (FMEA)	NR	NR	NR	NR
C.1.6	Failure Mode, Effects, and Criticality Analysis (FMECA)	NR	NR	NR	NR
C.1.7	Fault Tree Analysis (FTA)	NR	NR	NR	NR
C.1.8	Reliability-Centered Maintenance Analysis (RCM)	NR	NR	NR	NR
C.1.9	Task Inventory	NR	NR	NR	NR
C.1.10	Design Alternatives	T, G	NR	NR	T, G
C.1.11	Function Updates	NR	NR	NR	NR
C.2	SUPPORT SYSTEM ALTERNATIVES				
C.2.1	Alternative Support Concepts	E, G	E, G	E, G	E, G
C.2.2	Support Concept Updates	E, G	E, G	E, G	E, G
C.2.3	Alternative Support Plans	T, G	T, G	T, G	T, G
C.2.4	Support Plan Updates	T, G	T, G	T, G	T, G
C.2.5	Support Plan Risks	E, G	E, G	E, G	E, G
C.3	EVALUATION OF ALTERNATIVES AND TRADEOFF ANALYSIS				
C.3.1	Tradeoff Criteria	E, G	NR	NR	E, G
C.3.2	Support System Tradeoffs	E, G	NR	NR	E, G
C.3.3	Sensitivity of Support Tradeoffs	E, G	NR	NR	E, G
C.3.4	Manpower/Personnel/Training Tradeoffs	E, G	NR	NR	E, G
C.3.5	Job/Duty Tradeoffs	E, G	NR	NR	E, G
C.3.6	Level of Repair Analysis	T, G	NR	NR	T, G
C.3.7	Diagnostics Tradeoffs	E, G	NR	NR	E, G
C.3.8	BCS/New Product Tradeoffs	E, G	NR	NR	E, G
C.3.9	Energy Tradeoffs	E, G	NR	NR	E, G
C.3.10	Damage/Repair Tradeoffs	E, G	NR	NR	E, G
C.3.11	Transportability Tradeoffs	E, G	NR	NR	E, G
C.3.12	Facility Tradeoffs	E, G	NR	NR	E, G

E-ESSENTIAL, NR-NOT REQUIRED, T-TAILORABLE, G-GOVERNMENT, C-CONTRACTOR, O-EITHER GOVERNMENT OR CONTRACTOR, J-JOINT GOVERNMENT AND CONTRACTOR, MOD-MODIFICATION, COM-COMMERCIAL ITEM, NDI-NON-DEVELOPMENTAL ITEM, DEV DEVELOPMENT

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TABLE XIV. Preparation and evaluation of alternatives in the TMRR phase (Activities C.1 through C.3)

TECHNOLOGY MATURATION AND RISK REDUCTION PHASE					
ACTIVITY	PREPARATION AND EVALUATION OF ALTERNATIVE ACTIVITIES	MOD	COM	NDI	DEV
C.1	FUNCTIONAL REQUIREMENTS				
C.1.1	Functional Requirement Identification	E, C	E, C	E, C	E, C
C.1.2	Unique Item Functions	E, C	E, C	E, C	E, C
C.1.3	Function Drivers	E, C	E, C	E, C	E, C
C.1.4	Function Risks	E, C	T, C	T, C	E, C
C.1.5	Failure Modes and Effects Analysis (FMEA)	E, C	T, C	T, C	E, C
C.1.6	Failure Mode, Effects, and Criticality Analysis (FMECA)	E, C	T, C	T, C	E, C
C.1.7	Fault Tree Analysis (FTA)	E, C	T, C	T, C	E, C
C.1.8	Reliability-Centered Maintenance Analysis (RCM)	E, C	T, C	T, C	E, C
C.1.9	Task Inventory	E, C	T, C	T, C	E, C
C.1.10	Design Alternatives	E, C	T, C	T, C	E, C
C.1.11	Function Updates	E, C	T, C	T, C	E, C
C.2	SUPPORT SYSTEM ALTERNATIVES				
C.2.1	Alternative Support Concepts	E, O	E, O	E, O	E, O
C.2.2	Support Concept Updates	E, O	E, O	E, O	E, O
C.2.3	Alternative Support Plans	T, O	E, O	T, O	T, O
C.2.4	Support Plan Updates	T, O	T, O	T, O	T, O
C.2.5	Support Plan Risks	E, O	T, O	T, O	T, O
C.3	EVALUATION OF ALTERNATIVES AND TRADEOFF ANALYSIS				
C.3.1	Tradeoff Criteria	E, O	T, O	T, O	E, O
C.3.2	Support System Tradeoffs	T, O	T, O	T, O	T, O
C.3.3	Sensitivity of Support Tradeoffs	T, O	T, O	T, O	T, O
C.3.4	Manpower/Personnel/Training Tradeoffs	T, O	T, C	T, O	T, O
C.3.5	Job/Duty Tradeoffs	T, O	T, C	T, O	T, O
C.3.6	Level of Repair Analysis	E, O	T, C	T, O	E, O
C.3.7	Diagnostics Tradeoffs	T, J	T, J	T, J	T, J
C.3.8	BCS/New Product Tradeoffs	T, O	T, C	T, O	T, O
C.3.9	Energy Tradeoffs	T, O	T, C	T, O	T, O
C.3.10	Damage/Repair Tradeoffs	T, O	T, C	T, O	T, O
C.3.11	Transportability Tradeoffs	T, O	T, C	T, O	T, O
C.3.12	Facility Tradeoffs	T, O	T, C	T, O	T, O

E-ESSENTIAL, NR-NOT REQUIRED, T-TAILORABLE, G-GOVERNMENT, C-CONTRACTOR, O-EITHER GOVERNMENT OR CONTRACTOR, J-JOINT GOVERNMENT AND CONTRACTOR, MOD-MODIFICATION, COM-COMMERCIAL ITEM, NDI-NON-DEVELOPMENTAL ITEM, DEV DEVELOPMENT

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TABLE XV. Preparation and evaluation of alternatives in the EMD phase (Activities C.1 through C.3)

ENGINEERING & MANUFACTURING DEVELOPMENT PHASE					
ACTIVITY	PREPARATION AND EVALUATION OF ALTERNATIVE ACTIVITIES	MOD	COM	NDI	DEV
C.1	FUNCTIONAL REQUIREMENTS				
C.1.1	Functional Requirement Identification	T, C	E, C	E, C	T, C
C.1.2	Unique Item Functions	T, C	E, C	E, C	T, C
C.1.3	Function Drivers	T, C	E, C	E, C	T, C
C.1.4	Function Risks	T, C	T, C	T, C	T, C
C.1.5	Failure Modes and Effects Analysis (FMEA)	T, C	T, C	T, C	T, C
C.1.6	Failure Mode, Effects, and Criticality Analysis (FMECA)	T, C	T, C	T, C	T, C
C.1.7	Fault Tree Analysis (FTA)	T, C	T, C	T, C	T, C
C.1.8	Reliability-Centered Maintenance Analysis (RCM)	T, C	T, C	T, C	T, C
C.1.9	Task Inventory	T, C	T, C	T, C	T, C
C.1.10	Design Alternatives	T, C	T, C	T, C	T, C
C.1.11	Function Updates	T, C	T, C	T, C	T, C
C.2	SUPPORT SYSTEM ALTERNATIVES				
C.2.1	Alternative Support Concepts	NR	T, O	T, O	NR
C.2.2	Support Concept Updates	T, O	T, O	T, O	T, C
C.2.3	Alternative Support Plans	E, O	T, O	T, O	E, C
C.2.4	Support Plan Updates	E, O	T, O	T, O	E, C
C.2.5	Support Plan Risks	E, O	T, O	T, O	E, C
C.3	EVALUATION OF ALTERNATIVES AND TRADEOFF ANALYSIS				
C.3.1	Tradeoff Criteria	E, O	T, O	T, O	E, O
C.3.2	Support System Tradeoffs	T, O	T, O	T, O	T, O
C.3.3	Sensitivity of Support Tradeoffs	T, O	T, O	T, O	T, O
C.3.4	Manpower/Personnel/Training Tradeoffs	T, O	T, C	T, O	T, O
C.3.5	Job/Duty Tradeoffs	T, O	T, C	T, O	T, O
C.3.6	Level of Repair Analysis	E, O	T, C	T, O	E, O
C.3.7	Diagnostics Tradeoffs	T, J	T, J	T, J	T, J
C.3.8	BCS/New Product Tradeoffs	T, O	T, C	T, O	T, O
C.3.9	Energy Tradeoffs	T, O	T, C	T, O	T, O
C.3.10	Damage/Repair Tradeoffs	T, O	T, C	T, O	T, O
C.3.11	Transportability Tradeoffs	T, O	T, C	T, O	T, O
C.3.12	Facility Tradeoffs	T, O	T, C	T, O	T, O

E-ESSENTIAL, NR-NOT REQUIRED, T-TAILORABLE, G-GOVERNMENT, C-CONTRACTOR, O-EITHER GOVERNMENT OR CONTRACTOR, J-JOINT GOVERNMENT AND CONTRACTOR, MOD-MODIFICATION, COM-COMMERCIAL ITEM, NDI-NON-DEVELOPMENTAL ITEM, DEV DEVELOPMENT

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TABLE XVI. Preparation and evaluation of alternatives in the P&D phase (Activities C.1 through C.3)

PRODUCTION & DEPLOYMENT PHASE					
ACTIVITY	PREPARATION AND EVALUATION OF ALTERNATIVE ACTIVITIES	MOD	COM	NDI	DEV
C.1	FUNCTIONAL REQUIREMENTS				
C.1.1	Functional Requirement Identification	NR	NR	NR	NR
C.1.2	Unique Item Functions	NR	NR	NR	NR
C.1.3	Function Drivers	NR	NR	NR	NR
C.1.4	Function Risks	NR	NR	NR	NR
C.1.5	Failure Modes and Effects Analysis (FMEA)	NR	NR	NR	NR
C.1.6	Failure Mode, Effects, and Criticality Analysis (FMECA)	NR	NR	NR	NR
C.1.7	Fault Tree Analysis (FTA)	NR	NR	NR	NR
C.1.8	Reliability-Centered Maintenance Analysis (RCM)	NR	NR	NR	NR
C.1.9	Task Inventory	NR	NR	NR	NR
C.1.10	Design Alternatives	NR	NR	NR	NR
C.1.11	Function Updates	T, C	NR	NR	T, C
C.2	SUPPORT SYSTEM ALTERNATIVES				
C.2.1	Alternative Support Concepts	NR	NR	NR	NR
C.2.2	Support Concept Updates	NR	NR	NR	NR
C.2.3	Alternative Support Plans	NR	NR	NR	NR
C.2.4	Support Plan Updates	NR	NR	NR	NR
C.2.5	Support Plan Risks	T, O	NR	NR	T, O
C.3	EVALUATION OF ALTERNATIVES AND TRADEOFF ANALYSIS				
C.3.1	Tradeoff Criteria	T, O	T, O	T, O	T, O
C.3.2	Support System Tradeoffs	T, O	T, O	T, O	T, O
C.3.3	Sensitivity of Support Tradeoffs	NR	T, O	T, O	NR
C.3.4	Manpower/Personnel/Training Tradeoffs	NR	T, O	T, O	NR
C.3.5	Job/Duty Tradeoffs	T, O	T, O	T, O	T, O
C.3.6	Level of Repair Analysis	T, O	T, O	T, O	T, O
C.3.7	Diagnostics Tradeoffs	NR	T, J	T, J	NR
C.3.8	BCS/New Product Tradeoffs	T, O	T, O	T, O	T, O
C.3.9	Energy Tradeoffs	T, O	T, O	T, O	T, O
C.3.10	Damage/Repair Tradeoffs	T, O	T, O	T, O	T, O
C.3.11	Transportability Tradeoffs	NR	NR	NR	NR
C.3.12	Facility Tradeoffs	NR	NR	NR	NR

E-ESSENTIAL, NR-NOT REQUIRED, T-TAILORABLE, G-GOVERNMENT, C-CONTRACTOR, O-EITHER GOVERNMENT OR CONTRACTOR, J-JOINT GOVERNMENT AND CONTRACTOR, MOD-MODIFICATION, COM-COMMERCIAL ITEM, NDI-NON-DEVELOPMENTAL ITEM, DEV DEVELOPMENT

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TABLE XVII. Preparation and evaluation of alternatives in the O&S phase (Activities C.1 through C.3)

OPERATIONS & SUPPORT PHASE					
ACTIVITY	PREPARATION AND EVALUATION OF ALTERNATIVE ACTIVITIES	MOD	COM	NDI	DEV
C.1	FUNCTIONAL REQUIREMENTS				
C.1.1	Functional Requirement Identification	NR	NR	NR	NR
C.1.2	Unique Item Functions	NR	NR	NR	NR
C.1.3	Function Drivers	NR	NR	NR	NR
C.1.4	Function Risks	NR	NR	NR	NR
C.1.5	Failure Modes and Effects Analysis (FMEA)	NR	NR	NR	NR
C.1.6	Failure Mode, Effects, and Criticality Analysis (FMECA)	NR	NR	NR	NR
C.1.7	Fault Tree Analysis (FTA)	NR	NR	NR	NR
C.1.8	Reliability-Centered Maintenance Analysis (RCM)	NR	NR	NR	NR
C.1.9	Task Inventory	NR	NR	NR	NR
C.1.10	Design Alternatives	NR	NR	NR	NR
C.1.11	Function Updates	T, O	NR	NR	T, C
C.2	SUPPORT SYSTEM ALTERNATIVES				
C.2.1	Alternative Support Concepts	NR	NR	NR	NR
C.2.2	Support Concept Updates	NR	NR	NR	NR
C.2.3	Alternative Support Plans	NR	NR	NR	NR
C.2.4	Support Plan Updates	T, C	NR	NR	T, C
C.2.5	Support Plan Risks	NR	NR	NR	NR
C.3	EVALUATION OF ALTERNATIVES AND TRADEOFF ANALYSIS				
C.3.1	Tradeoff Criteria	NR	NR	NR	NR
C.3.2	Support System Tradeoffs	NR	NR	NR	NR
C.3.3	Sensitivity of Support Tradeoffs	NR	NR	NR	NR
C.3.4	Manpower/Personnel/Training Tradeoffs	NR	NR	NR	NR
C.3.5	Job/Duty Tradeoffs	NR	NR	NR	NR
C.3.6	Level of Repair Analysis	T, O	T, O	T, O	T, O
C.3.7	Diagnostics Tradeoffs	NR	NR	NR	NR
C.3.8	BCS/New Product Tradeoffs	NR	NR	NR	NR
C.3.9	Energy Tradeoffs	NR	NR	NR	NR
C.3.10	Damage/Repair Tradeoffs	NR	NR	NR	NR
C.3.11	Transportability Tradeoffs	NR	NR	NR	NR
C.3.12	Facility Tradeoffs	NR	NR	NR	NR

E-ESSENTIAL, NR-NOT REQUIRED, T-TAILORABLE, G-GOVERNMENT, C-CONTRACTOR, O-EITHER GOVERNMENT OR CONTRACTOR, J-JOINT GOVERNMENT AND CONTRACTOR, MOD-MODIFICATION, COM-COMMERCIAL ITEM, NDI-NON-DEVELOPMENTAL ITEM, DEV DEVELOPMENT

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5.11.15.5 Activity selection for determination of product support resource requirements.

TABLE XVIII - TABLE XXII are provided to guide users through choosing activities for determining product support resource requirements.

TABLE XVIII. Determination of product support resource requirements in the MSA phase (Activities D.1 through D.2)

MATERIEL SOLUTION ANALYSIS PHASE					
ACTIVITY	DETERMINATION OF PS RESOURCE REQUIREMENTS ACTIVITIES	MOD	COM	NDI	DEV
D.1	TASK ANALYSIS				
D.1.1	Conduct Task Analysis	NR	NR	NR	NR
D.1.2	Document Task Analysis	NR	NR	NR	NR
D.1.3	New/Critical Resources	NR	NR	NR	NR
D.1.4	Training and Performance Support Requirements	NR	NR	NR	NR
D.1.5	Design Influence	NR	NR	NR	NR
D.1.6	Risk Reduction	NR	NR	NR	NR
D.1.7	Transportability Analysis	NR	NR	NR	NR
D.1.8	Supply Support	NR	NR	NR	NR
D.1.9	Logistics Products	NR	NR	NR	NR
D.1.10	Task Analysis Updates	NR	NR	NR	NR
D.1.11	Parts Screening	NR	NR	NR	NR
D.1.12	Environment, Safety, and Occupational Health (ESOH) Analysis	NR	NR	NR	NR
D.2	EARLY DISTRIBUTION AND FIELDING ANALYSIS				
D.2.1	~~New~~ System Impacts	NR	NR	NR	NR
D.2.2	Impacts on Manpower and Personnel	NR	NR	NR	NR
D.2.3	Readiness Impacts	NR	NR	NR	NR
D.2.4	Survivability Analysis	NR	NR	NR	NR
D.2.5	Impact Solutions	NR	NR	NR	NR
E-ESSENTIAL, NR-NOT REQUIRED, T-TAILORABLE, G-GOVERNMENT, C-CONTRACTOR, O-EITHER GOVERNMENT OR CONTRACTOR, J-JOINT GOVERNMENT AND CONTRACTOR, MOD-MODIFICATION, COM-COMMERCIAL ITEM, NDI-NON-DEVELOPMENTAL ITEM, DEV DEVELOPMENT					

TABLE XIX. Determination of product support resource requirements in the TMRR phase (Activities D.1 through D.2)

TECHNOLOGY MATURATION AND RISK REDUCTION PHASE					
ACTIVITY	DETERMINATION OF PS RESOURCE REQUIREMENTS ACTIVITIES	MOD	COM	NDI	DEV
D.1	TASK ANALYSIS				
D.1.1	Conduct Task Analysis	T, C	NR	NR	T, C
D.1.2	Document Task Analysis	T, C	NR	NR	T, C
D.1.3	New/Critical Resources	T, C	NR	NR	T, C
D.1.4	Training and Performance Support Requirements	T, O	NR	NR	T, O
D.1.5	Design Influence	T, O	NR	NR	T, O
D.1.6	Risk Reduction	T, O	NR	NR	T, O
D.1.7	Transportability Analysis	T, J	NR	NR	T, J
D.1.8	Supply Support	T, O	NR	NR	T, O
D.1.9	Logistics Products	T, O	NR	NR	T, O
D.1.10	Task Analysis Updates	T, C	NR	NR	T, C
D.1.11	Parts Screening	T,C	NR	NR	T, C
D.1.12	Environment, Safety, and Occupational Health (ESOH) Analysis	T, O	NR	NR	T, O
D.2	EARLY DISTRIBUTION AND FIELDING ANALYSIS				
D.2.1	New System Impacts	NR	NR	NR	NR
D.2.2	Impacts on Manpower and Personnel	NR	NR	NR	NR
D.2.3	Readiness Impacts	NR	NR	NR	NR
D.2.4	Survivability Analysis	NR	NR	NR	NR
D.2.5	Impact Solutions	NR	NR	NR	NR
E-ESSENTIAL, NR-NOT REQUIRED, T-TAILORABLE, G-GOVERNMENT, C-CONTRACTOR, O-EITHER GOVERNMENT OR CONTRACTOR, J-JOINT GOVERNMENT AND CONTRACTOR, MOD-MODIFICATION, COM-COMMERCIAL ITEM, NDI-NON-DEVELOPMENTAL ITEM, DEV DEVELOPMENT					

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TABLE XX. Determination of product support resource requirements in the EMD phase (Activities D.1 through D.2)

ENGINEERING & MANUFACTURING DEVELOPMENT PHASE					
ACTIVITY	DETERMINATION OF PS RESOURCE REQUIREMENTS ACTIVITIES	MOD	COM	NDI	DEV
D.1	TASK ANALYSIS				
D.1.1	Conduct Task Analysis	T, C	T, C	T, C	T, C
D.1.2	Document Task Analysis	T, C	T, C	T, C	T, C
D.1.3	New/Critical Resources	T, C	T, C	T, C	T, C
D.1.4	Training and Performance Support Requirements	T, O	T, O	T, O	T, O
D.1.5	Design Influence	T, O	NR	NR	T, O
D.1.6	Risk Reduction	T, O	NR	NR	T, O
D.1.7	Transportability Analysis	T, J	T, J	T, J	T, J
D.1.8	Supply Support	E, C	E, J	E, J	E, C
D.1.9	Logistics Products	T, O	NR	NR	T, O
D.1.10	Task Analysis Updates	T, C	NR	NR	T, C
D.1.11	Parts Screening	T, C	T, C	T, C	T, C
D.1.12	Environment, Safety, and Occupational Health (ESOH) Analysis	T, O	T, O	T, O	T, O
D.2	EARLY DISTRIBUTION AND FIELDING ANALYSIS				
D.2.1	New System Impacts	T, G	E, G	E, G	E, G
D.2.2	Impacts on Manpower and Personnel	T, G	E, G	E, G	E, G
D.2.3	Readiness Impacts	T, O	E, O	E, O	E, O
D.2.4	Survivability Analysis	T, G	E, G	E, G	E, G
D.2.5	Impact Solutions	T, G	E, G	E, G	E, G
E-ESSENTIAL, NR-NOT REQUIRED, T-TAILORABLE, G-GOVERNMENT, C-CONTRACTOR, O-EITHER GOVERNMENT OR CONTRACTOR, J-JOINT GOVERNMENT AND CONTRACTOR, MOD-MODIFICATION, COM-COMMERCIAL ITEM, NDI-NON-DEVELOPMENTAL ITEM, DEV DEVELOPMENT					

TABLE XXI. Determination product support resource requirements in the P&D phase (Activities D.1 through D.2)

PRODUCTION & DEPLOYMENT PHASE					
ACTIVITY	DETERMINATION OF PS RESOURCE REQUIREMENTS ACTIVITIES	MOD	COM	NDI	DEV
D.1	TASK ANALYSIS				
D.1.1	Conduct Task Analysis	T, C	T, C	T, C	T, C
D.1.2	Document Task Analysis	T, C	T, C	T, C	T, C
D.1.3	New/Critical Resources	T, C	T, C	T, C	T, C
D.1.4	Training and Performance Support Requirements	T, O	T, O	T, O	T, O
D.1.5	Design Influence	T, O	NR	NR	T, O
D.1.6	Risk Reduction	T, O	NR	NR	T, O
D.1.7	Transportability Analysis	T, J	T, J	T, J	T, J
D.1.8	Supply Support	E, C	E, C	E, C	E, C
D.1.9	Logistics Products	T, O	NR	NR	T, O
D.1.10	Task Analysis Updates	T, C	NR	NR	T, C
D.1.11	Parts Screening	T, C	T, C	T, C	T, C
D.1.12	Environment, Safety, and Occupational Health (ESOH) Analysis	T, O	T, O	T, O	T, O
D.2	EARLY DISTRIBUTION AND FIELDING ANALYSIS				
D.2.1	New System Impacts	T, G	T, G	T, G	T, G
D.2.2	Impacts on Manpower and Personnel	T, G	T, G	T, G	T, G
D.2.3	Readiness Impacts	T, O	T, O	T, O	T, O
D.2.4	Survivability Analysis	T, G	T, G	T, G	T, G
D.2.5	Impact Solutions	T, G	T, G	T, G	T, G
E-ESSENTIAL, NR-NOT REQUIRED, T-TAILORABLE, G-GOVERNMENT, C-CONTRACTOR, O-EITHER GOVERNMENT OR CONTRACTOR, J-JOINT GOVERNMENT AND CONTRACTOR, MOD-MODIFICATION, COM-COMMERCIAL ITEM, NDI-NON-DEVELOPMENTAL ITEM, DEV DEVELOPMENT					

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TABLE XXII. Determination of product support resource requirements in the O&S phase (Activities D.1 through D.2)

OPERATIONS & SUPPORT PHASE					
ACTIVITY	DETERMINATION OF PS RESOURCE REQUIREMENTS ACTIVITIES	MOD	COM	NDI	DEV
D.1	TASK ANALYSIS				
D.1.1	Conduct Task Analysis	NR	NR	NR	NR
D.1.2	Document Task Analysis	NR	NR	NR	NR
D.1.3	New/Critical Resources	NR	NR	NR	NR
D.1.4	Training and Performance Support Requirements	NR	NR	NR	NR
D.1.5	Design Influence	NR	NR	NR	NR
D.1.6	Risk Reduction	NR	NR	NR	NR
D.1.7	Transportability Analysis	NR	NR	NR	NR
D.1.8	Supply Support	T, C	NR	NR	T, C
D.1.9	Logistics Products	NR	NR	NR	NR
D.1.10	Task Analysis Updates	T, C	NR	NR	T, C
D.1.11	Parts Screening	NR	NR	NR	NR
D.1.12	Environment, Safety, and Occupational Health (ESOH) Analysis	NR	NR	NR	NR
D.2	EARLY DISTRIBUTION AND FIELDING ANALYSIS				
D.2.1	New System Impacts	NR	NR	NR	NR
D.2.2	Impacts on Manpower and Personnel	NR	NR	NR	NR
D.2.3	Readiness Impacts	NR	NR	NR	NR
D.2.4	Survivability Analysis	NR	NR	NR	NR
D.2.5	Impact Solutions	NR	NR	NR	NR
E-ESSENTIAL, NR-NOT REQUIRED, T-TAILORABLE, G-GOVERNMENT, C-CONTRACTOR, O-EITHER GOVERNMENT OR CONTRACTOR, J-JOINT GOVERNMENT AND CONTRACTOR, MOD-MODIFICATION, COM-COMMERCIAL ITEM, NDI-NON DEVELOPMENTAL ITEM, DEV DEVELOPMENT					

5.11.15.6 Activity selection for product operational management.

TABLE XXIII - TABLE XXVII are provided to guide users through choosing activities for product operational management.

TABLE XXIII. Product operational management in the MSA phase (Activities E.1 through E.4)

MATERIEL SOLUTION ANALYSIS PHASE					
ACTIVITY	PRODUCT OPERATIONAL MANAGEMENT ACTIVITIES	MOD	COM	NDI	DEV
E.1	DMSMS MANAGEMENT, OBSOLESLENCE MANAGEMENT, AND COUNTERFEIT PREVENTION				
E.1.1	DMSMS and Obsolescence Management	NR	NR	NR	NR
E.1.2	Counterfeit Prevention	NR	NR	NR	NR
E.2	FIELD FEEDBACK				
E.2.1	Feedback Sources	NR	NR	NR	NR
E.2.2	Feedback Analysis	NR	NR	NR	NR
E.2.3	Management of Reliability Drivers through Failure Reporting Analysis and Corrective Action System (FRACAS)	NR	NR	NR	NR
E.3	DISPOSAL ANALYSIS				
E.3.1	Component Disposal	NR	NR	NR	NR
E.3.2	Product Disposal	NR	NR	NR	NR
E.4	IN-SERVICE SUPPORTABILITY				
E.4.1	Supportability in Mission Planning	NR	NR	NR	T, J
E.4.2	Supportability in Engineering Change	NR	NR	NR	NR
E-ESSENTIAL, NR-NOT REQUIRED, T-TAILORABLE, G-GOVERNMENT, C-CONTRACTOR, O-EITHER GOVERNMENT OR CONTRACTOR, J-JOINT GOVERNMENT AND CONTRACTOR, MOD-MODIFICATION, COM-COMMERCIAL ITEM, NDI-NON-DEVELOPMENTAL ITEM, DEV DEVELOPMENT					

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TABLE XXIV. Product operational management in the TMRR phase (Activities E.1 through E.4)

TECHNOLOGY MATURATION AND RISK REDUCTION PHASE					
ACTIVITY	PRODUCT OPERATIONAL MANAGEMENT ACTIVITIES	MOD	COM	NDI	DEV
E.1	DMSMS MANAGEMENT, OBSOLESLENCE MANAGEMENT, AND COUNTERFEIT PREVENTION				
E.1.1	DMSMS and Obsolescence Management	NR	NR	NR	T, G
E.1.2	Counterfeit Prevention	NR	NR	NR	T, G
E.2	FIELD FEEDBACK				
E.2.1	Feedback Sources	NR	NR	NR	T, J
E.2.2	Feedback Analysis	NR	NR	NR	T, J
E.2.3	Management of Reliability Drivers through Failure Reporting Analysis and Corrective Action System (FRACAS)	NR	NR	NR	T, J
E.3	DISPOSAL ANALYSIS				
E.3.1	Component Disposal	NR	NR	NR	T, J
E.3.2	Product Disposal	NR	NR	NR	T, J
E.4	IN-SERVICE SUPPORTABILITY				
E.4.1	Supportability in Mission Planning	NR	NR	NR	T, J
E.4.2	Supportability in Engineering Change	NR	NR	NR	T, J
E-ESSENTIAL, NR-NOT REQUIRED, T-TAILORABLE, G-GOVERNMENT, C-CONTRACTOR, O-EITHER GOVERNMENT OR CONTRACTOR, J-JOINT GOVERNMENT AND CONTRACTOR, MOD-MODIFICATION, COM-COMMERCIAL ITEM, NDI-NON-DEVELOPMENTAL ITEM, DEV DEVELOPMENT					

TABLE XXV. Product operational management in the EMD phase (Activities E.1 through E.4)

ENGINEERING & MANUFACTURING DEVELOPMENT PHASE					
ACTIVITY	PRODUCT OPERATIONAL MANAGEMENT ACTIVITIES	MOD	COM	NDI	DEV
E.1	DMSMS MANAGEMENT, OBSOLESLENCE MANAGEMENT, AND COUNTERFEIT PREVENTION				
E.1.1	DMSMS and Obsolescence Management	T, O	E, O	E, O	E, O
E.1.2	Counterfeit Prevention	T, O	E, O	E, O	E, O
E.2	FIELD FEEDBACK				
E.2.1	Feedback Sources	E, C	E, C	E, C	T, C
E.2.2	Feedback Analysis	NR	NR	NR	NR
E.2.3	Management of Reliability Drivers through Failure Reporting Analysis and Corrective Action System (FRACAS)	NR	NR	NR	NR
E.3	DISPOSAL ANALYSIS				
E.3.1	Component Disposal	E, C	E, C	E, C	E, C
E.3.2	Product Disposal	NR	NR	NR	E, C
E.4	IN-SERVICE SUPPORTABILITY				
E.4.1	Supportability in Mission Planning	E, G	E, G	E, G	E, G
E.4.2	Supportability in Engineering Change	NR	NR	NR	E, G
E-ESSENTIAL, NR-NOT REQUIRED, T-TAILORABLE, G-GOVERNMENT, C-CONTRACTOR, O-EITHER GOVERNMENT OR CONTRACTOR, J-JOINT GOVERNMENT AND CONTRACTOR, MOD-MODIFICATION, COM-COMMERCIAL ITEM, NDI-NON-DEVELOPMENTAL ITEM, DEV DEVELOPMENT					

TABLE XXVI. Product operational management in the P&D phase (Activities E.1 through E.4)

PRODUCTION & DEPLOYMENT PHASE					
ACTIVITY	PRODUCT OPERATIONAL MANAGEMENT ACTIVITIES	MOD	COM	NDI	DEV
E.1	DMSMS MANAGEMENT, OBSOLESLENCE MANAGEMENT, AND COUNTERFEIT PREVENTION				
E.1.1	DMSMS and Obsolescence Management	T, O	E, O	E, O	E, O
E.1.2	Counterfeit Prevention	T, O	E, O	E, O	E, O
E.2	FIELD FEEDBACK				
E.2.1	Feedback Sources	T, C	T, C	T, C	T, C
E.2.2	Feedback Analysis	E, C	E, C	E, C	E, C
E.2.3	Management of Reliability Drivers through Failure Reporting Analysis and Corrective Action System (FRACAS)	E, O	E, O	E, O	E, O
E.3	DISPOSAL ANALYSIS				
E.3.1	Component Disposal	E, C	E, C	E, C	E, C
E.3.2	Product Disposal	E, C	E, C	E, C	E, C
E.4	IN-SERVICE SUPPORTABILITY				
E.4.1	Supportability in Mission Planning	NR	NR	NR	E, O
E.4.2	Supportability in Engineering Change	E, O	NR	NR	E, O
E-ESSENTIAL, NR-NOT REQUIRED, T-TAILORABLE, G-GOVERNMENT, C-CONTRACTOR, O-EITHER GOVERNMENT OR CONTRACTOR, J-JOINT GOVERNMENT AND CONTRACTOR, MOD-MODIFICATION, COM-COMMERCIAL ITEM, NDI-NON-DEVELOPMENTAL ITEM, DEV DEVELOPMENT					

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TABLE XXVII. Product operational management in the O&S phase (Activities E.1 through E.4)

OPERATIONS & SUPPORT PHASE					
ACTIVITY	PRODUCT OPERATIONAL MANAGEMENT ACTIVITIES	MOD	COM	NDI	DEV
E.1	DMSMS MANAGEMENT, OBSOLESLENCE MANAGEMENT, AND COUNTERFEIT PREVENTION				
E.1.1	DMSMS and Obsolescence Management	E, O	E, O	E, O	E, O
E.1.2	Counterfeit Prevention	E, O	E, O	E, O	E, O
E.2	FIELD FEEDBACK				
E.2.1	Feedback Sources	NR	NR	NR	NR
E.2.2	Feedback Analysis	E, O	E, O	E, O	E, O
E.2.3	Management of Reliability Drivers through Failure Reporting Analysis and Corrective Action System (FRACAS)	E, O	E, O	E, O	E, O
E.3	DISPOSAL ANALYSIS				
E.3.1	Component Disposal	E, C	E, C	E, C	E, C
E.3.2	Product Disposal	E, O	E, O	E, O	E, O
E.4	IN-SERVICE SUPPORTABILITY				
E.4.1	Supportability in Mission Planning	NR	NR	NR	NR
E.4.2	Supportability in Engineering Change	E, O	NR	NR	E, O
E-ESSENTIAL, NR-NOT REQUIRED, T-TAILORABLE, G-GOVERNMENT, C-CONTRACTOR, O-EITHER GOVERNMENT OR CONTRACTOR, J-JOINT GOVERNMENT AND CONTRACTOR, MOD-MODIFICATION, COM-COMMERCIAL ITEM, NDI-NON-DEVELOPMENTAL ITEM, DEV DEVELOPMENT					

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5.11.15.7 Activity Selection for Suitability Assessment.

TABLE XXVIII - TABLE XXXII are provided to guide users through choosing activities for suitability assessment.

TABLE XXVIII. Suitability assessment in the MSA phase (Activities F.1 through F.2)

MATERIEL SOLUTION ANALYSIS PHASE					
ACTIVITY	SUITABILITY ASSESSMENT ACTIVITIES	MOD	COM	NDI	DEV
F.1	SUPPORTABILITY AND SUITABILITY TEST, EVALUATION, VERIFICATION AND VALIDATION				
F.1.1	Test and Evaluation Strategy	T, J	T, J	T, J	T, J
F.1.2	Product Support Package (PSP)	NR	NR	NR	NR
F.1.3	Test Objectives/Resources	NR	NR	NR	NR
F.1.4	Validation	NR	NR	NR	NR
F.1.5	Analyze Test Results	NR	NR	NR	NR
F.2	SUPPORTABILITY PERFORMANCE ASSESSMENT				
F.2.1	Establish Performance Measurement Framework	NR	NR	NR	T, J
F.2.2	Measure and Compile Supportability Performance Data	NR	NR	NR	NR
F.2.3	Analyze Performance Levels	NR	NR	NR	NR
F.2.4	Propose Changes to Support Solution	NR	NR	NR	NR
F.2.5	Update Performance Measurement Framework, PSP, and LPD	NR	NR	NR	NR
E-ESSENTIAL, NR-NOT REQUIRED, T-TAILORABLE, G-GOVERNMENT, C-CONTRACTOR, O-EITHER GOVERNMENT OR CONTRACTOR, J-JOINT GOVERNMENT AND CONTRACTOR, MOD-MODIFICATION, COM-COMMERCIAL ITEM, NDI-NON-DEVELOPMENTAL ITEM, DEV-DEVELOPMENT					

TABLE XXIX. Suitability assessment in the TMRR phase (Activities F.1 through F.2)

TECHNOLOGY MATURATION AND RISK REDUCTION PHASE					
ACTIVITY	SUITABILITY ASSESSMENT ACTIVITIES	MOD	COM	NDI	DEV
F.1	SUPPORTABILITY AND SUITABILITY TEST, EVALUATION, VERIFICATION AND VALIDATION				
F.1.1	Test and Evaluation Strategy	E, J	E, J	E, J	E, J
F.1.2	Product Support Package (PSP)	E, G	E, G	E, G	E, G
F.1.3	Test Objectives/Resources	E, G	E, G	E, G	E, G
F.1.4	Validation	NR	NR	NR	E, G
F.1.5	Analyze Test Results	NR	NR	NR	E, G
F.2	SUPPORTABILITY PERFORMANCE ASSESSMENT				
F.2.1	Establish Performance Measurement Framework	T, O	T, O	T, O	T, O
F.2.2	Measure and Compile Supportability Performance Data	NR	NR	NR	NR
F.2.3	Analyze Performance Levels	NR	NR	NR	NR
F.2.4	Propose Changes to Support Solution	NR	NR	NR	NR
F.2.5	Update Performance Measurement Framework, PSP, and LPD	NR	NR	NR	NR
E-ESSENTIAL, NR-NOT REQUIRED, T-TAILORABLE, G-GOVERNMENT, C-CONTRACTOR, O-EITHER GOVERNMENT OR CONTRACTOR, J-JOINT GOVERNMENT AND CONTRACTOR, MOD-MODIFICATION, COM-COMMERCIAL ITEM, NDI-NON-DEVELOPMENTAL ITEM, DEV-DEVELOPMENT					

TABLE XXX. Suitability assessment in the EMD phase (Activities F.1 through F.2)

ENGINEERING & MANUFACTURING DEVELOPMENT PHASE					
ACTIVITY	SUITABILITY ASSESSMENT ACTIVITIES	MOD	COM	NDI	DEV
F.1	SUPPORTABILITY AND SUITABILITY TEST, EVALUATION, VERIFICATION AND VALIDATION				
F.1.1	Test and Evaluation Strategy	T, J	T, J	T, J	T, J
F.1.2	Product Support Package (PSP)	T, G	T, G	T, G	T, G
F.1.3	Test Objectives/Resources	E, G	E, G	E, G	E, G
F.1.4	Validation	NR	NR	NR	E, G
F.1.5	Analyze Test Results	NR	NR	NR	E, G
F.2	SUPPORTABILITY PERFORMANCE ASSESSMENT				
F.2.1	Establish Performance Measurement Framework	T, O	T, O	T, O	T, O
F.2.2	Measure and Compile Supportability Performance Data	NR	NR	NR	NR
F.2.3	Analyze Performance Levels	NR	NR	NR	NR
F.2.4	Propose Changes to Support Solution	NR	NR	NR	NR
F.2.5	Update Performance Measurement Framework, PSP, and LPD	NR	NR	NR	NR
E-ESSENTIAL, NR-NOT REQUIRED, T-TAILORABLE, G-GOVERNMENT, C-CONTRACTOR, O-EITHER GOVERNMENT OR CONTRACTOR, J-JOINT GOVERNMENT AND CONTRACTOR, MOD-MODIFICATION, COM-COMMERCIAL ITEM, NDI-NON-DEVELOPMENTAL ITEM, DEV- DEVELOPMENT					

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TABLE XXXI. Suitability assessment in the P&D phase (Activities F.1 through F.2)

PRODUCTION & DEPLOYMENT PHASE					
ACTIVITY	SUITABILITY ASSESSMENT ACTIVITIES	MOD	COM	NDI	DEV
F.1	SUPPORTABILITY AND SUITABILITY TEST, EVALUATION, VERIFICATION AND VALIDATION				
F.1.1	Test and Evaluation Strategy	NR	NR	NR	NR
F.1.2	Product Support Package (PSP)	NR	NR	NR	NR
F.1.3	Test Objectives/Resources	NR	NR	NR	NR
F.1.4	Validation	NR	NR	NR	NR
F.1.5	Analyze Test Results	NR	NR	NR	NR
F.2	SUPPORTABILITY PERFORMANCE ASSESSMENT				
F.2.1	Establish Performance Measurement Framework	NR	NR	NR	NR
F.2.2	Measure and Compile Supportability Performance Data	T, O	T, O	T, O	T, O
F.2.3	Analyze Performance Levels	T, O	T, O	T, O	T, O
F.2.4	Propose Changes to Support Solution	T, O	T, O	T, O	T, O
F.2.5	Update Performance Measurement Framework, PSP, and LPD	T, O	T, O	T, O	T, O
E-ESSENTIAL, NR-NOT REQUIRED, T-TAILORABLE, G-GOVERNMENT, C-CONTRACTOR, O-EITHER GOVERNMENT OR CONTRACTOR, J-JOINT GOVERNMENT AND CONTRACTOR, MOD-MODIFICATION, COM-COMMERCIAL ITEM, NDI-NON-DEVELOPMENTAL ITEM, DEV-DEVELOPMENT					

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TABLE XXXII. Suitability assessment in the O&S phase (Activity F.1)

OPERATIONS & SUPPORT PHASE					
ACTIVITY	SUITABILITY ASSESSMENT ACTIVITIES	MOD	COM	NDI	DEV
F.1	SUPPORTABILITY AND SUITABILITY TEST, EVALUATION, VERIFICATION AND VALIDATION				
F.1.1	Test and Evaluation Strategy	NR	NR	NR	NR
F.1.2	Product Support Package (PSP)	NR	NR	NR	NR
F.1.3	Test Objectives/Resources	NR	NR	NR	NR
F.1.4	Validation	NR	NR	NR	NR
F.1.5	Analyze Test Results	NR	NR	NR	NR
E-ESSENTIAL, NR-NOT REQUIRED, T-TAILORABLE, G-GOVERNMENT, C-CONTRACTOR, O-EITHER GOVERNMENT OR CONTRACTOR, J-JOINT GOVERNMENT AND CONTRACTOR, MOD-MODIFICATION, COM-COMMERCIAL ITEM, NDI-NON-DEVELOPMENTAL ITEM, DEV-DEVELOPMENT					
OPERATIONS & SUPPORT PHASE					
ACTIVITY	SUITABILITY ASSESSMENT ACTIVITIES	MOD	COM	NDI	DEV
F.2	SUPPORTABILITY PERFORMANCE ASSESSMENT				
F.2.1	Establish Performance Measurement Framework	NR	NR	NR	NR
F.2.2	Measure and Compile Supportability Performance Data	NR	NR	NR	NR
F.2.3	Analyze Performance Levels	NR	NR	NR	NR
F.2.4	Propose Changes to Support Solution	NR	NR	NR	NR
F.2.5	Update Performance Measurement Framework, PSP, and LPD	NR	NR	NR	NR
E-ESSENTIAL, NR-NOT REQUIRED, T-TAILORABLE, G-GOVERNMENT, C-CONTRACTOR, O-EITHER GOVERNMENT OR CONTRACTOR, J-JOINT GOVERNMENT AND CONTRACTOR, MOD-MODIFICATION, COM-COMMERCIAL ITEM, NDI-NON-DEVELOPMENTAL ITEM, DEV-DEVELOPMENT					

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6 CONTRACTING GUIDANCE

6.1 Contracting for Product Support.

6.1.1 Purpose and Scope.

The contracting process offers an excellent opportunity to execute the PSS by involvement of potential performing activities when competition is present. PMs (in coordination with their Program Executive Officers (PEOs) and Resource Manager) should develop a post-award strategy to ensure they are identifying intellectual property rights (IPR) as defined by the Federal Acquisition Regulations (FAR) and Defense Federal Acquisition Regulation Supplement (DFARS). Historically, the DoD and Military Departments have not effectively defined or managed the IPR procured by the government or identified by contractors in proposals by not including effective CDRLs and DIDs in contracts. The SOW establishes the product/system development requirements; the CDRL orders the delivery of the data according to the SOW, and the DID describes the format and content of the data/products ordered by the CDRL as articulated in the FAR and DFARS. It is incumbent upon the government, including PSMs/logisticians, and the PM and Contracting Officer's Representative (COR) specifically, to review each deliverable and report unjustified/nonconforming or other inappropriate markings on delivered data to the Contracting Officer to ensure the PEO has the opportunity to take full advantage of the government's rights. Consistent with the requirements of the contract, the Contracting Officer, with the assistance of Legal Counsel, is responsible for enforcement of the DFARS provisions and other key terms and conditions of the contract. The logistician provides input on the various contracting sections as explained in this section. For additional information reference FAR Part 1 - Federal Acquisition Regulations System, FAR Part 12 - Acquisition of Commercial Products and Commercial Services, and FAR Part 15 - Contracting by Negotiation.

6.1.2 Organization of this Section.

The Contracting Section is divided into five sections. Four of the five sections contain suggested language for RFP Sections C, H and I, L, and M. This material can be tailored for use in the specific phase of an acquisition program. It can also be tailored for use in contract modifications. In addition, there is a short section on developing Contract Line Item Numbers (CLINs). Note that Appendix A contains suggested - DIDs for use in preparing the CDRL and for identifying other contractual deliverables. Appendix B provides information on Data Rights for the government including FAR and DFARS clauses specifying the government's rights to acquire data.

6.1.3 Acquisition Strategy and Business Strategy Guides for Product Support Input.

The acquisition strategy drives the selection of the specific requirements that are included in the contract. The business strategy is the specific acquisition approach for each element of support. These strategies determine the structure of Sections B, C, and H of the contract. The acquisition and business strategies are translated into Section B by breaking down each strategy into requirements by year and by support element. Section B is organized by contract line item and contract year. The PM is responsible for ensuring that all essential requirements of the acquisition strategy are included in the contract. Since product support needs are spread throughout the solicitation/contract, the acquisition logistician is concerned with the entire document. Specifically, the logistician, as the requirements activity, should provide inputs to the RFP, SOW, CDRLs, and selection of DIDs for presentation to the PM and COR for consideration. 1, shows the part and section format for a solicitation and contract as required by the Federal Acquisition Regulation. As supportability and product support needs are defined, it is extremely important to keep the solicitation parts consistent. Each section should complement the others and not present contradictory information. Requirements should be expressed clearly to potential offerors in order to establish enforceable contracts. In the solicitation, the objectives for product support are to:

a. Integrate product support needs wherever support may be required.

b. Identify, analyze, and resolve support deficiencies.

c. Systematically identify and evaluate support system alternatives.

d. Manage support acquisition throughout the contracting process.

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e. Track and review deliverables.

f. Report deficiencies to the PM and COR.

g. Provide inputs on contractor performance in the periodic contractor status reports, financial reports, and Contractor Performance Assessment Reporting System (CPARS).

h. Develop a timely, effective support capability at an economical life cycle cost.

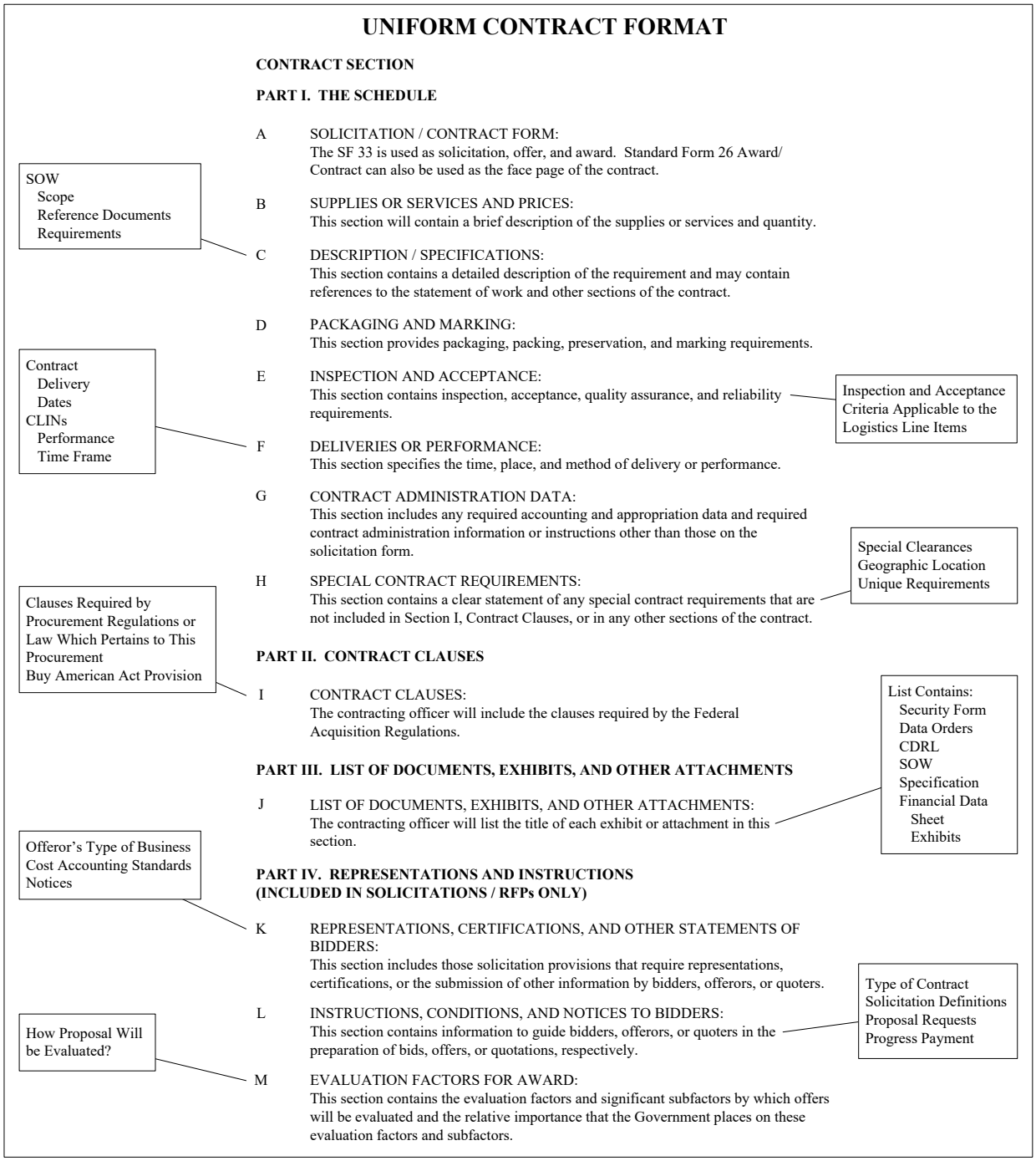


FIGURE 14. Uniform contract format

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6.1.4 RFP Section Inputs.

The table below summarizes possible product support content of each section. Remember that product support implications should be addressed in nearly every section of the solicitation/contract.

TABLE XXXIII. Product support content of each section of the solicitation or contract

SECTION	EXAMPLE OF PRODUCT SUPPORT INPUTS
A.	None
B.	All line items needed for completing required product support deliverables by the end of the applicable acquisition phase, including option and warranty needs when applicable.
C.	1. Description (specifications), to the extent needed beyond the description of line items in Section B, of product support end items.
	2. Work effort descriptions, considering life cycle costs, for use in statement of work translating/relating.
D.	All packaging and marking not included in Sections C.
E.	Any peculiar inspection and/or acceptance criteria applicable to the product support line items in Section B.
F.	The desired or required time period when each product support line item in Section B is to be delivered.
G.	Normally none, unless determined by Contracting Officer.
H.	1. Title and/or description and any special language needed for Government Furnished Property and for controlling or incentivizing product support, technical, cost, or schedule performance, including special design to cost, incentive, and warranty provisions.
	2. Specific paragraphs for use in any special provision for making sure product support administration is accomplished.
I.	Normally none.
J.	1. The product support portion of the preliminary contract work breakdown structure, including the interfaces among deliverable and non-deliverable product support elements, and descriptions of each product support element.
	2. Support related inputs to life cycle-cost mathematical models.
	3. DID inputs for technical data or product support management data needs, including configuration control data and integrated support plan.
	4. Planned or assumed concepts, ranges, schedules, etc., and inputs to assumptions.
	5. Support equipment exhibits.
	6. Provisioning requirements.
K.	Identify support related certification requirements.
L.	1. Any instruction for making sure proposals: a. Are responsive to product support needs, b. Provide alternative support solutions, and c. Provide information required for evaluating product support under Section M.
	2. Notification of any product support conditions or constraints.
	3. Any historical information required for the proposals.
M.	The product support evaluation factors for award, their order of priority, and the recommend relative order of their importance in comparison to all non-product support evaluation factors.

6.1.5 Acquisition Policy.

The Undersecretary of Defense (Acquisition, Technology and Logistics) (USD)(AT&L)'s Memorandum for Acquisition Professionals (dated November 13, 2012 (https://www.acq.osd.mil/)) provided specific guidance related to delivering better value to the taxpayer and warfighter by improving the way the DoD does business. One of the five main themes of the Memorandum is promotion of real competition across the entire DoD Enterprise. A critical element for enabling competition is the use of acquisition and contracting language that addresses the business and technical principles that comprise and will lead to a strong support structure and minimize vendor locked situations to maximize acquisition choice and flexibility.

6.1.6 Incentivizing Technical Excellence.

Incentivizing technical excellence. Incentivizing technical excellence in the program is an important aspect of the program AS and can be applied through the major contract types to motivate the contactor. The incentive arrangement should be designed to motivate contractor performance that might not otherwise be emphasized. The incentive approach allows the government to motivate exceptional contractor performance considering the conditions under which it was achieved. These conditions are normally in such areas as adherence to PSA technical and business practices, cooperative behavior with other vendors, as well as the more usual quality, timeliness, technical progress, technical ingenuity, and cost-effective management requirements. The award fee or term criteria should be based on the requirements described in the contract. The most effective criteria are objective in nature. When possible, criteria should be expressed in quantifiable terms. Some PSA technical criteria are inherently mixed with and supportive of PSA business practices.

6.1.7 Statements of Work Language.

6.1.7.1 Purpose and Scope.

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The SOW plays a significant role during proposal evaluation and source selection. Failure to sufficiently describe the scope of work often results in delay and extra administration effort during the source selection process. The ability to clearly define the desired end product in a clear, precise manner affects the type of contract. After contract award, the SOW becomes the standard for measuring contractor performance. As the effort progresses, both the government and the contractor constantly refer to the SOW to determine their respective rights and obligations regarding the contract. When a question arises concerning an apparent increase in the scope of work to be performed, the SOW is the baseline document that should be used to resolve the issue. Language that defines the limits of the contractor's effort is of critical importance. If the limits were poorly established, it will be difficult to determine if or when there has been an increase in scope. As a result, effective negotiations on cost and schedule will be impaired, if not impossible.

6.1.7.2 Work Statements.

A SOW further defines the scope of work when a supply or service cannot be sufficiently defined in Section B and the specification. SOWs are usually prepared using the Work Breakdown Structure described in MIL-STD-881. The underlying philosophy is a SOW should be stated in performance terms (objectives or requirements) as much as possible. Other approaches are also being considered at senior levels within the Office of the Secretary of Defense. These include issuing government developed draft SOWs for contractor response, or just providing a system specification or requirements document without a SOW being utilized at all.

6.1.7.3 Section C of the Request for Proposal (RFP).

Section C of the RFP and the resulting contract contains the detailed description of the products to be delivered or the work to be performed. Section C typically includes a SOW for the RFP/contract. The SOW is a clear and concise statement that delineates the program objectives and the overall program approach, including the outcome desired. The SOW, along with the preliminary system performance specification (covering the technical performance requirements), provides offerors guidance for proposing a solution to meet the user's needs. An additional helpful reference is the "Department of Defense Handbook for Preparation of Statement of Work (SOW)".

6.1.7.4 Pre-Proposal and Bidder's Conferences.

Properly structured pre-proposal and bidders conference can provide opportunities for feedback from potential bidders on selecting and focusing analysis activity and data item requirements. This helps ensure that the requiring authority has not included inappropriate RFP requirements, such as trades in areas where there is no freedom to trade, or data requirements which are premature or duplicative.

6.1.7.5 Preparing PSA RFP Requirements.

The RFP is normally the first formal communication between the government and industry and is therefore a key document in the acquisition process. Industry interprets an RFP to be an expression of all the items of importance to the government since these will form the basis upon which the contract is written. Industry leverages its ingenuity to provide a competitive product that meets the stated requirements. This section discusses some suggested practices in preparing the RFP.

6.1.7.5.1 Broad Versus Specifics.

Provide the total support concept as early as possible. Structure the RFP to pose the broad problem to be addressed by the Product PSA program and provide information on necessary analysis activities and data required. Do not go into unnecessary detail in establishing requirements too early in the life cycle, especially if the scenarios are conceptual and design is still only crudely defined. Describe the freedom the bidder has for feedback. The bidder can then draw from experience and innovation to fine tune the requirements. Bidder feedback should be considered as recommendations only to preclude legal problems. Do not destroy credibility by asking for inputs which are inconsequential in source selection or to the program as a whole.

6.1.7.5.2 Interweave Supportability Requirements and Constraints.

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Structure the RFP in such a way that supportability constraints and supportability related design requirements are interwoven into the appropriate system/development specification sections or other system/equipment description. This provides all stakeholders with access to the design a clear understanding of the supportability constraints and requirements. A properly structured RFP requires readiness and supportability inputs into many different sections. Consequently, more than just the product support portions of the SOW and contract data requirements list should be addressed. The major areas for supportability input into an RFP include the following:

a. Section B, Supplies/Services and Prices. Establish supportability work efforts and requirements as separate contract line items where possible.

b. Section C, Description/Specifications. Enter supportability work efforts and supportability design requirements.

c. Section E, Inspection and Acceptance. Enter any peculiar inspection and/or acceptance criteria applicable to the product support line items in Section B.

d. Section F, Deliveries or Performance. Consider statement that delivery of the system/equipment will not be accepted without concurrent delivery of required logistic products.

e. Section H, Special Contract Requirements. Consider inclusion of supportability incentives such as a design to life cycle cost goal.

f. Section I, Contract Clauses. Ensure that applicable Defense Acquisition Regulation clause(s) on rights in technical data and computer software are included.

g. Section L, Instructions, Conditions, and Notices to Bidders. Ensure proposal preparation instructions relative to supportability aspect of the RFP are detailed and clearly written. Consider a separate proposal section for supportability.

h. Section M, Evaluation Factors for Awards given to supportability.

6.1.7.5.3 Relative Importance of Requirements.

State the order of importance of the supportability related parameters being requested to the source selection criteria. This permits the PSA team to make an honest effort providing the best PSA activity selection for the least cost. For example, indicate that reliability and maintainability (R&M) are to be of high priority, and size and weight to be of low priority only if it is true; not when the size and weight requirements are inflexible and paramount. Identify any requirements which are soft, and in which the requester would consider slight reductions for other significant benefits. Contractors should be made aware of the responsibility to obligate their vendor/subcontractors to fulfill the applicable requirements, procedures, terms, conditions, and data requirements stated within this document.

6.1.7.6 Support Related Design Drivers.

Consistent with the degree of design freedom, ask the bidder to identify those design attributes which may prove to be the key influencing factors in readiness, acquisition cost, O&S cost, and product support resource demands. Have the bidder identify the PSA activities that will be used to analyze these requirements.

6.1.8 Developing Contract Line Item Numbers.

6.1.8.1 Section B – Supplies or Services and Prices.

The Logistics Engineer (LE) or PSM is responsible for preparing Section B's product support requirements. Since Section B determines the direction and emphasis of the procurement request, the LE or PSM should develop the product support acquisition strategy and requirements to guide the planning and procurement of maintenance and support. The requirements and strategy derive from previous management activities and the PSS.

6.1.8.2 The Ordering Clause.

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The ordering clause governs the ordering of supplies or services detailed in Section B. Specifically, this clause governs the acquisition of supplies or services specified in provisioned CLINs in Section B. This clause is important to the logistician because the terms determine how flexibly product support CLINs can be activated. There are several variations on the basic FAR 52.216-18 "Ordering" clause. As prescribed in 16.506(a), the following clause is inserted in solicitations and contracts when a definite-quantity contract, a requirements contract, or an indefinite-quantity contract is considered.

Ordering (Aug 2020)

(a) Any supplies and services to be furnished under this contract should be ordered by issuance of delivery orders or task orders by the individuals or activities designated in the Schedule. Such orders may be issued from _____ through _____ [insert dates].

(b) All delivery orders or task orders are subject to the terms and conditions of this contract. In the event of conflict between a delivery order or task order and this contract, the contract should control.

(c) A delivery order or task order is considered "issued" when—

(1) If sent by mail (includes transmittal by U.S. mail or private delivery service), the Government deposits the order in the mail;

(2) If sent by fax, the Government transmits the order to the Contractor's fax number; or

(3) If sent electronically, the Government either—

(i) Posts a copy of the delivery order or task order to a Government document access system, and notice is sent to the Contractor; or

(ii) Distributes the delivery order or task order via email to the Contractor's email address.

(d) Orders may be issued by methods other than those enumerated in this clause only if authorized in the contract.

(End of Clause)

FIGURE 15. FAR 52.216-18 ordering clause

6.1.8.3 What is Being Procured.

Section B (along with Section C, Description/Specifications, which was discussed in detail in the previous section), represents the cornerstone of the procurement request. Sections B and C are prepared before the other sections. Section B lists all supplies, data, and services to be acquired. Specifically, Section B:

a. Lists what is being procured (supplies, data, services).

b. Identifies each requirement as a Contract Line Item with a CLIN.

c. Determines the direction and emphasis of the procurement request.

d. Constitutes the basis for cross-referencing for all subsequent sections since all subsequent sections should refer to the Section B CLINs.

6.1.8.4 CLIN Defined.

A CLIN is a process of assigning unique numbers to specific contract elements. This is to ensure that all contracted requirements are identified. Each CLIN should be defined and described in detail. This prevents confusion when ordering or tracking of parts or items of a contract. The CLIN identifies each supply or service recorded in the database. The number will appear once for each separate item, even if multiple schedules apply. Separate contract line items are established for:

a. Trade Studies

b. Product Support Research and Development

c. Support Equipment (peculiar and common)

d. Supply Support (spare and repair parts, including spares acquisition integrated with production)

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e. Training

f. Services

g. Equipment

h. Contractor Support

i. Data

j. Product Performance Agreements (including warranties/guarantees)

k. Testing

l. Facilities

m. Product Support Management Systems

n. Simulators

o. Computer Resources

p. Configuration Management

q. Technical Manuals

r. Packaging, Handling, Storage, and Transportation

6.1.8.5 CLIN Format.

Establish separate CLINs for technical data to be delivered under a contract as required by DFARS Part 227. Solicitations and contracts should also include priced contract option CLINs for future delivery of technical data that were not acquired upon initial contract award. Priced contract option CLINs should also be included for technical data rights licenses when the government desires additional rights in technical data. Consult with the cognizant counsel for preparation of CLINs and option CLINs.

6.1.9 Section E – Inspection and Acceptance.

Section E of the RFP includes inspection, acceptance, quality assurance, and reliability requirements. A question for consideration is: Has the acquisition team developed a tailored quality assurance surveillance plan to monitor contractor performance? This section should describe the organization and procedures to perform the R&M task. The following FAR and DFARS clauses can be added for assurance of product quality: FAR 46.2, 52.246, Requirements for Product Verification Testing to include First Article testing, Change of Supplier Notice, Non-conforming Material Notification, Certificate of Conformance requirements, DFARS 252.246-7003 Notification of Potential Safety Issues, Drawings for inspection, Inspection of Equipment interchangeability of Components, Final Inspection Report (FIR).

6.1.10 Special Contract Language.

6.1.10.1 Sections H and I – Policy and Regulatory Requirements.

Section H and Section I are the primary sections whereby policy and regulatory requirements are incorporated as enforceable elements of a contract. New policies and regulations continuously grow from Congressional legislation, executive branch administration actions, and DoD initiatives. Section H defines special contract requirements, as explained below. Section I lists general contract clauses applicable to the contract, as published in the FAR, DFARS, and service-specific policy issuances.

6.1.10.1.1 The Role of the Logistician in Development of Sections H and I.

The logistician, along with the Systems Engineers and IPT members, has two major roles: procurement request development responsibilities, and contract administration responsibilities. The LE's role varies based on the contract. On the procurement request development team, the LE influences the structure of Sections H and I

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through input to the Acquisition Plan and the PSAP. In developing Sections H and I, the Logistics Engineer may:

a. Translate the PSS into special clause requirements.

b. Define the quantity requirements for product support supplies and services.

c. Define options for product support supplies and services.

d. Define the product support-related government furnished equipment for a contract.

e. Define the rights in data.

f. Draft clause requirements to support the system maintenance concept.

g. Support the negotiation team and source selection team by evaluating the product support impacts of contract changes proposed during negotiation.

h. Serve as the product support representative on the procurement request development team.

6.1.10.1.2 Section H – Special Contract Requirements.

Section H defines special contract requirements such as ordering options, safety, HSI, radioactive materials, security, release of information to the public, labor category descriptions, payment schedule, and expected minimum and maximum costs. The special contract requirements clauses for Section H are based on the acquisition strategy and the PSS. The information in the earlier sections, particularly Section B, will guide contracts personnel in developing a draft Section H. The LE, along with the Systems Engineers and IPT members, should help select the applicable clauses to support special product support-related requirements for the procurement.

6.1.10.1.3 Section H of the Request for Proposal (RFP) Language.

A helpful reference is the “Department of Defense Handbook for Preparation of Statement of Work (SOW)”. “Section H Special Provisions” should only be developed and used in close coordination with Legal Counsel. Legal Counsel should review and approve all Section H Special Provisions. The program should consider developing a “Section H Special Provision” that, at a minimum, incorporates the offeror’s proposal relating to a PSAP into the resultant contracts and requires government concurrence prior to any change in that plan.

6.1.10.1.4 Clause H – Requirement for a PSAP.

The PSAP is the basic tool for establishing and executing an effective PSA program. It should effectively document what PSA activities are to be accomplished, when each activity will be accomplished, which organizational units will be responsible for their accomplishment, and how the results of each activity will be used. Plans submitted in response to solicitation documents assist the requiring authority in evaluating the prospective performing activity's approach to and understanding of the PSA activity requirements, and the organizational structure for performing PSA activities. The PSAP is generally submitted in response to a solicitation document and generally becomes a part of the SOW when approved by the requiring authority. When requiring a PSAP, the requiring authority should allow the performing activity to propose additional activities or activity modifications, with supporting rationale to show overall program benefits, to those activities contained in the solicitation document. The PSAP should be a dynamic document that reflects current program status and planned actions. Accordingly, procedures should be established for updates and approval of updates by the requiring authority when conditions warrant. Program schedule changes, test results, or PSA activity results may dictate a change in the PSAP for it to be used effectively as a management document.

6.2 Obtaining Engineering Data for Provisioning.

Engineering data for provisioning is technical data which provides definitive identification of dimensional, materiel, mechanical, electrical, or other characteristics sufficient for provisioning of the support items of the end item(s) on contract. This data is used to accomplish the provisioning process and is required to perform provisioning for all systems and equipment, as well as to support the PSA. The SOW/contract should mention

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that the engineering data should be adequate to identify, catalogue, and procure each part in the end item and their relationship to other parts in the equipment. Activities D.1.8 and D.1.10 of SAE TA-STD-0017A may be utilized on the SOW/contract when contracting for engineering data for provisioning. The DoD preference is to use the contract DID, DI-SESS-81874 Engineering Data for Provisioning, to support the provisioning process. The SOW/contract order of precedence for engineering data for provisioning should be first, product engineering drawings, secondly, in process/incomplete product engineering drawings sufficient for the provisioning process and finally, commercial drawings or associated lists.

6.3 Instructions for Bidder's Language.

6.3.1 Section L – Instructions, Conditions and Notices to Bidders.

Section L of the RFP provides proposal instructions, conditions and notices to bidders.

6.3.1.1 Content of Section L.

Bidders should be encouraged to clearly demonstrate, through their use of similar technologies previously developed, the ability to meet the design, development, testing, and production requirements of the solicitation, with particular attention to a modular open system design approach, in the quantities and schedules specified in the RFP. Section L should be carefully structured to address only those elements determined to be keys to success.

6.3.1.2 Goals of Section L.

Section L is designed to accomplish two major tasks. First, it gives contractors the background information required to understand the overall scope of the program. Second, it gives specific instructions for the preparation of their proposals. The LE supplies solicitation instructions on logistics matters related to these activities. Information should be sufficiently detailed to let the bidders:

a. Identify the general characteristics of the logistics scenario.

b. Establish the types of maintenance support at each site.

c. Set up the level of availability to be maintained.

d. Make or develop estimates to set up probable frequencies or occurrence of events.

e. Identify basic and alternative flows of support resources to and from each site.

f. Set up manning, skill, and facility needs for each site.

g. Identify concepts and needs for reliability, maintainability, supportability, and testability.

h. Perform availability, supportability, and cost studies to trade off alternate support, hardware, and software concepts.

6.3.2 Life Cycle Supportability.

Also contained in section L of the RFP is a detailed description of how the offeror intends to enhance life cycle supportability by implementing performance-based logistics arrangements to sustain the components through the life cycle. Program sustainment strategies such as PBA should be tailored to its specific requirements. A Business Case Analysis (BCA) should be done in conjunction with development of these strategies to ensure that they are appropriate for the business and technical model being incorporated in the program as identified in the DoD Product Support BCA Guidebook.

6.3.3 Traceability of System Requirements.

A detailed description of the bidder's approach for ensuring that all supportability requirements are met through a demonstrated ability to trace each requirement to one or more deliverables.

6.3.3.1 Sharing Documentation Across Activities.

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Documentation is shared across multiple activities. For instance, task documentation should be developed to the degree that will allow another activity to use the task results as input data to perform other PSA activities, or as input to conduct the same task in greater detail in a later acquisition phase. When some activities are performed by the government and others are performed by a contractor, procedures should be established to provide for the interchange of data or information between the performing activities. For example, activities performed by government activities should be documented to the applicable DID requirements to ensure compatibility of documentation. When PSA activities are performed by a contractor, task documentation required for delivery to the government should be specified on the CDRL, DD Form 1423, with appropriate DIDs being cited. The CDRL identifies data and information that the contractor is obligated to deliver under the contract. DIDs are used to define and describe the data required to be furnished by the contractor. DIDs are structured to identify the maximum range of data that can be documented in a report. The requiring authority can tailor down these requirements by deleting unwanted data from the data selection form and making appropriate use of the CDRL. For example, if the requiring authority wants a System/Design Trade Study Report which only covers the tradeoff analysis results (Activity C.3.1) or the data from only one of the tradeoff activities (e.g., Activity C.3.6) this can be accomplished through appropriate entries on the CDRL. By appropriately completing the CDRL and removing unwanted data in Block 10 of the applicable DIDs, the requiring authority can structure the deliverable data products to cost effectively meet program requirements.

6.3.3.2 The Bidder Should Perform Supportability Modeling.

The utility of models to perform some aspects of PSA is almost in direct proportion to equipment complexity. For complex systems, a model is almost mandatory to relate the system/equipment's design, operational, and support parameters to system performance. Models are defined as systematic, analytical processes used to predict system parameters. They can vary from a simple analytical equation for inherent availability to a complex simulation model covering a multiple end item environment and all levels of maintenance. Models used early in the life cycle are generally system level models requiring a small amount of input data. Later in the acquisition process, as the design becomes better defined and a support concept is established, a more detailed model might be more applicable. Models used during the PSA process should only be as complex as required to analyze the problem at hand. Simple, easy to apply models requiring little input data should be used whenever possible to enhance the timeliness of the results. When system readiness, life cycle cost, O&S cost, or other models are specified in RFPs, the requiring authority needs to assess the proposal to evaluate the bidder's understanding of the model and its results. Model estimates and data should be traceable from the operational and support concepts to the R&M predictions and design. There should be evidence that design features justify the input data used.

6.3.4 Management Approach.

Good management of the PSA effort requires: (1) planning which identifies all the required actions, (2) scheduling which identifies the timing of each required action and who is responsible for each action, and (3) execution through timely management decisions. Management procedures should be established to ensure that the right information is available at the right time so that timely decisions can be made. PSA planning and management should always be performed by the requiring authority.

6.3.5 Cost Proposal (PSA related).

There is a considerable distinction between data and the documentation of data. Additionally, there are many different forms of documentation for PSA data which frequently overlap. Because of these factors, PSA program data and data formatting requirements should be carefully scoped to meet program needs in a cost-effective manner. Factors which affect data and documentation costs include the following:

a. Timing of preparation and delivery. Documentation or recording of data should coincide with the generation of such data in the design and analysis sequences that such data will not have to be recreated at added expense at a later date. Delivery of data should be postponed until actual need date to acquire data in its most complete form without repetitive updates.

b. Use of the data by the performing activity. The less use, the more expensive.

c. Special formatting requirements.

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d. Degree of detail required.

e. Degree of research required to obtain the data.

f. Accuracy and amount of verification required.

g. Duration of responsibility for data contents.

h. Availability and accuracy of source data from which to construct documentation. For example, poorly prepared or inaccurate schematics will increase the cost of technical manuals.

6.3.6 Data and Data Documentation Costs Control.

Data and data documentation costs can be effectively controlled by the following methods:

a. Screening requirements prior to preparation of solicitation documents. Each data requirement should be reviewed for data content, end use, formatting needs, scheduled delivery, and estimated cost to eliminate duplication and ensure proper integration and scheduling of requirements. This function is generally performed by IPS management.

b. Using contractor format whenever possible. This generally reduces cost and may also provide important insights to contractor controls, checks, and balances between design and PSA attributes. Additionally, reformatting requirements often result in a distillation of original data which can provide misleading or incomplete information.

c. Involve potential bidders in briefings and planning conferences prior to issuance of a solicitation document. This helps ensure that data and data documentation requirements are realistic, and that maximum use is made of data already available.

6.3.7 Section M – Evaluation Factors for Award.

Section M conveys the basis for evaluation of the proposals received. It should never be used to evaluate criteria aimed at products/services that were not included in the solicitation. Evaluation factors should be measurable, meaningful, traceable, and limited to contractor controllable items. Remember that the solicitation prepared will be used to evaluate the bidder proposals. The criteria included in the solicitation should be consistent with service policy. This consistency requires tailoring the evaluation criteria or program characteristics. Define the criteria carefully to identify the rank order of importance of technical, product support, costs, schedule, past performance, and other factors as set forth in the source selection plan. If the PSA program is to be meaningful, its rank and value in selection process should be clear. Fully defined criteria:

a. Indicate that the government decision makers have considered their priorities.

b. Inform the bidders of the order of importance determined by the government for these priorities.

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7 NOTES

7.1 Intended Use.

The purpose of this handbook is to offer guidance on product support as an integral part of the systems engineering process. The information contained herein is applicable, in part or in whole, to all types of materiel and automated information systems and all acquisition strategies. The contractual wording contained herein is not binding, nor can this handbook be placed on contract.

7.2 Subject Term (Key Word) Listing.

Contracting for supportability
Integrated logistics support
Integrated product support
Level of repair analysis
Logistics product data
Logistics support analysis
Maintenance and support alternatives
Maintenance planning
Maintenance task analysis
Product support data
Sensitivity analysis
Technical data for product support

7.3 Changes from Previous Issue.

Marginal notations are not used in this revision to identify changes with respect to the previous issue due to the extent of the changes.

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APPENDIX A - EXAMPLE CDRLS AND DIDS

A.1 SCOPE

A.1.1 Scope.

The section provides CDRL examples and DID suggestions. The CDRLs identify data and information that the contractor will be obligated to deliver under the contract. DIDs are used to define and describe the data required to be furnished by the contractor. After selecting the data and information to be delivered, the selections are documented in the SOW and CDRL line item entries. Each CDRL entry should reference the appropriate DID. Note that as part of tailoring, analysis requirements should be selected for specific phases and types of programs.

A.2 APPLICABLE DOCUMENTS

A.2.1 General.

The documents listed in this section are specified in Appendix A of this handbook. This section does not include documents cited in other sections of this handbook or recommended for additional information or as examples.

A.2.2 Government Documents.

The following government documents, drawings, and publications form a part of this document to the extent specified herein. Unless otherwise specified, the issues of these documents are those cited in the solicitation or contract.

A.2.3 Specifications, Standards, and Handbooks.

The following government documents, drawings, and publication form a part of this document to the extent specified herein. Unless otherwise specified, the issues of those documents are those cited in the solicitation or contract.

DEPARTMENT OF DEFENSE STANDARDS

MIL-STD-31000 - Technical Data Packages

(Copies of this document are available online at https://assist.dla.mil or from the Standardization Document Order Desk, 700 Robbins Avenue, Building 4D, Philadelphia, PA 19111-5094.)

A.2.4 Other Government Documents, Drawings, and Publications.

The following other government documents, drawings, and publication form a part of this document to the extent specified herein. Unless otherwise specified, the issues of these documents are those cited in the solicitation or contract.

DEPARTMENT OF DEFENSE MANUALS

DFARS 207.106 - Additional Requirements for Major Systems

(Copies of DFARS documents are available online at https://www.acq.osd.mil/dpap/dars/dfarspgi/current/index.html.)

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A.3 CDRLS AND DIDS

A.3.1 DID Suggestions.

When PSA tasks are performed by a contractor, task documentation that is required for delivery to the government will be specified on the CDRL, DD Form 1423, with appropriate DIDs being cited. The CDRL will identify data and information that the contractor will be obligated to deliver under the contract. DIDs are used to define and describe the data required to be furnished by the contractor. Applicable DIDs that describe the data resulting from performance of the PSA activities contained in SAE TA-STD-0017A are identified on TABLE A-I.

A.3.2 CDRL Examples.

FIGURE A-1 through FIGURE A-4 are examples of CDRLs and deliverable items, as directed by the SOW, which support PSA and can be incorporated into contracts. This is not intended to be an exhaustive list of all potential deliverable items but is an attempt to list only a few deliverables believed to significantly support PSA and can be augmented/reduced as the PM believes is appropriate. The frequency and delivery dates of the deliverables should be specified, along with a list of deliverable recipients.

NOTES

1. The program plan and directive documentation should specify that anything the government paid to develop is available for delivery to the government with all the developmental artifacts and unlimited usage rights. In addition, the program should require that the deliverables be provided (or deposited) in the appropriate repository (if established) such as the Navy's SHARE Repository or those made available through the DoD's Forge.mil Program.

2. To help clearly understand the data rights to be provided to the government, the government recommends that a table listing all the CDRLs be inserted as an attachment to the proposal which includes a column wherein the offeror states the data rights to be provided with that CDRL when delivered.

3. Software should be delivered in a standalone fashion, i.e., not encumbered by any particular configuration management tool. Future sites/locations/programs that ultimately will use the software or artifacts should have the ability to use whatever configuration management tool they desire without any overt or hidden dependencies on a given tool.

4. When citing regulations such as the DFARS and FAR, dates are included where possible to reflect the most recent version of this Handbook. However, Contracting Officers and PMs should check for current clause dates before using the language in this Handbook.

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A. CONTRACT LINE ITEM NO. CLIN - 0116, 0212, 0312	B. EXHIBIT A	C. CATEGORY: TD _X_____ Summary_____ Analysis_____
D. SYSTEM/ITEM XXX	E. CONTRACT/PR NO. 123-456-789	F. CONTRACTOR Prime Contractor A
1. DATA ITEM NO. A001	2. TITLE OF DATA ITEM Logistics Product Data	3. SUBTITLE FMECA
4. AUTHORITY *(Data Acquisition Document No.)* DI-SESS-81758A & DI-SESS-81759A	5. CONTRACT REFERENCE PWS Paragraph 3.6.1.2	6. REQUIRING OFFICE Office Symbol

7. DD 250 REQ LT	9. DIST STATEMENT C	10. FREQUENCY ASREQ	12. DATE OF 1ST SUBMISSION SEE BLOCK 16
8. APP CODE A		11. AS OF DATE	13. DATE OF SUBSEQUENT SUBMISSION ASREQ

16. REMARKS

Block 3: LSA-004, Maintenance Allocation Chart
LSA-030, Indentured Parts List
LSA-056, Failure Modes, Effects and Criticality Analysis (FMECA)
LSA-080, Bill of Materials
LSA-151, Provisioning Parts List Index

Block 8: Approval will be required 45 days prior to initiation of system testing.

Block 9: DISTRIBUTION STATEMENT C. Distribution authorized to U.S. Government Agencies and their contractors due to critical technology as of 7 December 2011. Other requests for this document should be referred to the controlling DoD office.

Block 12: Initial submission should be due at the first critical design review. The government has 30 days to accept/reject and provide comments. The contractor should have 20 days to incorporate changes.

Block 13: Subsequent draft submissions should be due 30 days prior to any design review, demonstration or test event. Final draft submissions should be due 30 days after any PCA. The government has 30 days to accept/reject and provide comments. The contractor should have 20 days to incorporate changes. Final delivery should encompass the entirety of all government tested and approved capabilities and should be due 90 days prior to the end of the contract. Revisions will be required through the life of the contract.

Block 14. Contractor format is not acceptable. Contractor should deliver LSA reports in HTML and PDF formats generated using the LSAR database. LPD delivery should consist of the entire LSAR database, reports, and any supporting documentation in MS Office and PDF formats on a CD-ROM, FTP, or via electronic mail to the Project Director, Acquisition Logistician, and Contract Specialist.

Tailor DI-SESS-81758A as follows:
See Logistics Product Data and Summaries - Attribute Selection Worksheet.
Warranty Data should be incorporated into the LPD database and reports as applicable.

Tailor DI-SESS-81759A as follows:
Refer to SAE TA-HB-0007-1 Logistics Product Data Summaries Handbook

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FIGURE A-1. CDRL example, LPD data

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A. CONTRACT LINE ITEM NO. CLIN - 0116, 0212, 0312	B. EXHIBIT A	C. CATEGORY: TD_____ Summary___X____ Analysis____X_____
D. SYSTEM/ITEM XXX	E. CONTRACT/PR NO. 123-456-789	F. CONTRACTOR Prime Contractor A
1. DATA ITEM NO. A002	2. TITLE OF DATA ITEM Logistics Product Data Summaries	3. SUBTITLE LPD Summaries
4. AUTHORITY *(Data Acquisition Document No.)* DI-SESS-81759A	5. CONTRACT REFERENCE PWS Paragraph 3.6.1.2	6. REQUIRING OFFICE Office Symbol

7. DD 250 REQ SD	9. DIST STATEMENT A	10. FREQUENCY ASREQ	12. DATE OF 1ST SUBMISSION SEE BLOCK 16
8. APP CODE A		11. AS OF DATE	13. DATE OF SUBSEQUENT SUBMISSION ASREQ

16. REMARKS

Block 3: Maintenance Planning
Repair Analysis
Support and Test Equipment
Manpower, Personnel, and Training
Facilities
Packaging, Handling, Storage, and Transportation
Post Production Support

Block 4: Content of the LPD summaries should be tailored for each site and be in accordance with DI-SESS-81759A.

Block 8: Approval will be required 45 days prior to initiation of system testing.

Block 9: DISTRIBUTION STATEMENT C. Distribution authorized to U.S. Government Agencies and their contractors due to critical technology as of 7 December 2011. Other requests for this document should be referred to the controlling DoD office.

Block 12: Initial submission should be due at the first critical design review. The government has 30 days to accept/reject and provide comments. The contractor should have 20 days to incorporate changes.

Block 13: Subsequent draft submissions should be due 30 days prior to any design review, demonstration or test event. Final draft submissions should be due 30 days after any PCA. The government has 30 days to accept/reject and provide comments. The contractor should have 20 days to incorporate changes. Final delivery should encompass the entirety of all government tested and approved capabilities and should be due 90 days prior to the end of the contract. Revisions will be required through the life of the contract.

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FIGURE A-2. CDRL example, LPD summaries

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A. CONTRACT LINE ITEM NO. CLIN - 0116, 0212, 0312	**B. EXHIBIT** A	**C. CATEGORY:** TD_____ Summary___X____ Analysis____X_____	
D. SYSTEM/ITEM XXX	**E. CONTRACT/PR NO.** 123-456-789	**F. CONTRACTOR** Prime Contractor A	

16. REMARKS

Block 14: Reproducible documents (text, drawings, tables, charts, graphic packages used to create figures, and other type documents) should be delivered in an appropriate, applicable and editable format (AutoCAD, ProE, MSVisio, and compatible Microsoft Office 2007 products) on a CD-ROM, FTP, or via electronic mail to the Project Director, Acquisition Logistician, and Contract Specialist. A final approved copy should be delivered in an editable format and PDF.

Tailor DI-SESS-81759A as follows:
Warranty Data should be incorporated into the LPD database and reports as applicable.

Supply Support Additional Guidance:
Remove references to Provisioning List Item Sequence Number (PLISN).

Post Production Support Additional Guidance:
Identify any supportability risk items due to limited sources, long lead times, support limitations, obsolescence, or other concerns and suggest support alternatives to overcome them.

Provide overall average annual support cost estimates in current year dollars per site:
a) Hardware Maintenance (labor)
b) Routine replacement of parts (hardware)
c) Software support, including recurring licensing

Provide life expectancy and refresh recommendations (in years) for all major subsystems and components. (e.g. routine technical refresh of computer equipment)

Provide recommendations for when major modification or upgrades may be required (year, component, or subsystem, estimated cost).

Estimate requirements of labor and operations personnel for annual operations, support, and maintenance.
DD

G. PREPARED BY	**H. DATE**	**I. APPROVED BY**	**J. DATE**
Adam Smith/Data Office	07/01/2012	Jane Doe / Program Office	7/5/2012

FIGURE A-2. CDRL example, LPD summaries - Continued

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A. CONTRACT LINE ITEM NO. CLIN - 0116, 0212, 0312	**B. EXHIBIT** A	**C. CATEGORY:** TD _X_____ Summary_____ Analysis_____
D. SYSTEM/ITEM XXX	**E. CONTRACT/PR NO.** 123-456-789	**F. CONTRACTOR** Prime Contractor A
1. DATA ITEM NO. A003	**2. TITLE OF DATA ITEM** PRODUCT DRAWINGS/MODELS AND ASSOCIATED LISTS	**3. SUBTITLE**
4. AUTHORITY *(Data Acquisition Document No.)* DI-MISC-80711A	**5. CONTRACT REFERENCE** 3.1.5.4. Product Definition Data (PDD)	**6. REQUIRING OFFICE** Office Symbol

7. DD 250 REQ DD	**9. DIST STATEMENT** D	**10. FREQUENCY** ASREQ	**12. DATE OF 1ST SUBMISSION** SEE BLOCK 16
8. APP CODE N/A		**11. AS OF DATE**	**13. DATE OF SUBSEQUENT SUBMISSION** ASREQ

16. REMARKS

Block 4: Contractor format is acceptable IAW MIL-STD-31000 TDP Option Selection Worksheet Annex to Exhibit B for Product Drawings/Models and Associated Lists.

Block 9: Distribution Authorized to the Department of Defense (DoD) and U.S. DoD Contractors only due to administrative or operational use, effective DEC-11.
.

Block 12: Preliminaries should be due 10 days prior to each Preliminary Design Review (PDR), each Critical Design Review (CDR) and each Production Readiness Review (PRR).

Block 13: Final should be due 10 days after each Physical Configuration Audit (PCA). Government will have 30 days to accept/reject and provide comments. Contractor should have 30 days to incorporate changes. Revisions will be required through the life of the Delivery Order (DO).

Block 14: Deliverables should be delivered via electronic mail or 5¼ inch optical disk (CD or DVD) based on documentation size. All documents for government review should be delivered in PDF format to the controlling DoD office. This includes vector and raster based documents. After government acceptance, all documentation should be delivered in both PDF and native editable format. Native format is defined as being produced by COTS software (i.e. Microsoft Office, OpenOffice, AutoCAD, Vectorworks, or others).

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FIGURE A-3. CDRL example, EDFP

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A. CONTRACT LINE ITEM NO. CLIN - 0116, 0212, 0312	B. EXHIBIT A	C. CATEGORY: TD _X_____ Summary_____ Analysis_____
D. SYSTEM/ITEM XXX	E. CONTRACT/PR NO. 123-456-789	F. CONTRACTOR Prime Contractor A
1. DATA ITEM NO. A004	2. TITLE OF DATA ITEM Scientific and Technical Reports	3. SUBTITLE Logistics Engineering Report
4. AUTHORITY *(Data Acquisition Document No.)* DI-SESS-81000D	5. CONTRACT REFERENCE 3.7. Logistics Engineering	6. REQUIRING OFFICE Office Symbol

7. DD 250 REQ LT	9. DIST STATEMENT C	10. FREQUENCY MNTHLY	12. DATE OF 1ST SUBMISSION SEE BLOCK 16
8. APP CODE		11. AS OF DATE	13. DATE OF SUBSEQUENT SUBMISSION SEE BLOCK 16

16. REMARKS

Block 9: DISTRIBUTION STATEMENT C. Distribution authorized to U.S. Government Agencies and their contractors due to critical technology as of 7 December 2021. Other requests for this document should be referred to the controlling DoD office.

Block 12: Should be due 30 days after award of the contract on the 10th day of the month. The government has 15 days to accept/reject and provide comments. The contractor should have 10 days to incorporate changes.

Block 13: Should be required monthly through the life of the contract on the 10th day of each month. The government has 15 days to accept/reject and provide comments. The contractor should have 10 days to incorporate changes. Revisions as required through the life of the contract.

Block 14: Reproducible documents (text, drawings, tables, charts, graphic packages used to create figures, and other type documents) should be delivered in an appropriate, applicable and editable format (AutoCAD, ProE, MSVisio, and compatible Microsoft Office products) on a CD-ROM, FTP, or via electronic mail to the Project Director, Acquisition Logistician, and Contract Specialist. A final approved copy should be delivered in an editable format and PDF.

The contractor should furnish logistics engineering reports to the government that should contain, at a minimum, the following information:

14. DISTRIBUTION			
a. ADDRESSEE	b. COPIES		
	Draft	Final	
		Reg	Repro
SEE BLOCK 16	1	1	1
15. TOTAL --------→	1	1	1

G. PREPARED BY Adam Smith/Data Office	H. DATE 07/01/2012	I. APPROVED BY Jane Doe / Program Office	J. DATE 7/5/2012

FIGURE A-4. CDRL example, logistics engineering report

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CONTRACT DATA REQUIREMENTS LIST *(1 Data Item)*	*Form Approved* *OMB No. 0704-0188*

A. CONTRACT LINE ITEM NO. CLIN - 0116, 0212, 0312	B. EXHIBIT A	C. CATEGORY: TD _ _____ Summary_____ Misc____X_____
D. SYSTEM/ITEM XXX	E. CONTRACT/PR NO. 123-456-789	F. CONTRACTOR Prime Contractor A

16. REMARKS

a. Activities in progress at the end of the reporting period.

b. Actual start date and estimated time remaining until completion of each activity.

c. Activities scheduled to start during the next reporting period.

d. Start date, refined estimates of duration, and estimated completion date for each activity.

e. Other activities not yet started, when known dates are expected to deviate from the baseline start and finish dates reflected in the master schedules; and the expected start date and duration for each activity.

f. The status of the support program by support element.

g. Progress of the product support program, as it applies to each Logistics Support Analysis Control Number (LCN). This should include activities started, works in progress, activities completed, and completion status by LCN.

h. Drawings status by LCN, to include whether in-progress, preliminary, or released, and any revisions.

i. Status of contractor's progress against established baseline schedules and any revisions or changes to the contractor's originally established milestones.

j. Any update to the contractor's organizational matrix.

k. Status of open, new, changed, and closed design review comment sheets, including status of actions. (All new/revised/closed comment sheets are to be provided.)

l. Identification of all subcontractors and vendors; status of confirmation and status of any source data received.

m. Identification of any design changes during the reporting period that affect the reliability, availability, maintainability, and supportability of the system.

n. Contract Data Requirements List (CDRL) deliverable status to include data delivered, data requiring government response or approval, government response or approval received, delinquent data deliveries, and upcoming submittals.

o. Summary of trade-off analyses performed and a summary of analysis recommendations.

p. Summary of any prediction analysis

q. Identification of digital data made available for on-line access during the reporting period.

r. New or critical resources.

s. Operational scenarios modeled, assumptions made, constraints assumed, and non-economic factors imposed

t. Maintenance alternatives considered

u. Analytical method and models used to perform the economic evaluations

v. Discussion of any reliability, availability, maintainability, and supportability evaluation performed and results obtained

w. Provide any Reliability

G. PREPARED BY Adam Smith/Data Office	H. DATE 07/01/2012	I. APPROVED BY Jane Doe / Program Office	J. DATE 7/5/2012

FIGURE A-4. CDRL example, logistics engineering report - Continued

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A.3.3 Suggested Data Item Descriptions (DIDs).

TABLE A-I contains a list of suggested DIDs per each activity.

TABLE A-I. Suggested DIDs per each activity

Activity	Title	DID Number	DID Title	Comments
A.1	Product Support Strategy	DI-MISC-80711A	Scientific and Technical Reports	
A.2	Product Support Analysis Planning	DI-MISC-80711A DI-PSSS-82218A DI-MGMT-82363A	Scientific and Technical Reports Product Support Analysis Plan (PSAP) Contractor Support Plan (CSP)	
A.3	Program and Design Reviews	DI-MISC-80711A DI-ADMN-81249C DI-ADMN-81250C	Scientific and Technical Reports Conference Agenda Conference Minutes	
A.4	Integrated Data Environment for Product Support (IDE-PS)	DI-MISC-80711A	Scientific and Technical Reports	
B.1	Application and Usage Assessment	DI-MISC-80711A	Scientific and Technical Reports	
B.2	Support System Standardization	DI-MISC-80711A DI-STDZ-81993	Scientific and Technical Reports Parts, Materials, and Processes (PM&P) Management Plan	
B.3	Comparative Analysis	DI-MISC-80711A	Scientific and Technical Reports	
B.4	Technological Opportunities	DI-MISC-80711A	Scientific and Technical Reports	
B.5	Supportability and Supportability Related Design Factors	DI-MISC-80711A DI-SESS-81758A DI-SESS-81759A	Scientific and Technical Reports Logistics Product Data Logistics Product Data Summaries	See SAE GEIA-STD-0007 Logistics Product Data for data element definitions. See SAE TA-HB-0007-1, Logistics Product Data Summaries Handbook for summary definitions.
C.1	Functional Requirements	DI-MISC-80711A DI-SESS-81758A DI-SESS-81759A DI-MGMT-81398D DI-MISC-81397D DI-PSSS-81829A DI-SESS-81968	Scientific and Technical Reports Logistics Product Data Logistics Product Data Summaries HMMP Plan HMMP Report RCM Corrective Maintenance CM Development Report R&M Allocation Report	Data requirements should be coordinated with Reliability, Maintainability, and HSI program requirements. See. SAE GEIA-STD-0007 Logistics Product Data for data element definitions. See SAE TA-HB-0007-1 Logistics Product Data Summaries Handbook for summary definitions.
C.2	Support System Alternatives	DI-MISC-80711A	Scientific and Technical Reports	
C.3	Evaluation of Alternatives and Tradeoff Analysis	DI-MISC-80711A DI-PSSS-81872A DI-PSSS-81873A	Scientific and Technical Reports Level of Repair Analysis (LORA) Report Level of Repair Analysis (LORA) Input Data	
D.1	Task Analysis	DI-MISC-80711A DI-SESS-81874 DI-SESS-81758A DI-SESS-81759A DI-MGMT-81398D DI-MISC-81397D	Scientific and Technical Reports Engineering Data for Provisioning (EDFP) Logistics Product Data Logistics Product Data Summaries HMMP Plan HMMP Report	Data requirements should be coordinated with IPS element data requirements. See SAE GEIA-STD-0007, Logistics Product Data for data element definitions. See SAE TA-HB-0007-1, Logistics Product Data Summaries Handbook for summary definitions.
D.2	Early Distribution and Fielding Analysis	DI-MISC-80711A	Scientific and Technical Reports	
E.1	DMSMS Management, Obsolescence Management, and Counterfeit Prevention	DI-MISC-80711A DI-SESS-81656B	Scientific and Technical Reports Bill of Materials (BOM) for Logistics and Supply Chain Risk Management	
E.2	Field Feedback	DI-MISC-80711A	Scientific and Technical Reports	
E.3	Disposal Analysis	DI-MISC-80711A DI-SAFT-80931C DI-SESS-81758A DI-SESS-81759A DI-ENVR-80266A	Scientific and Technical Reports Explosive Ordnance Disposal Data Logistics Product Data Logistics Product Data Summaries Nuclear Hardness and Survivability Design Analysis Report	See SAE GEIA-STD-0007, Logistics Product Data for data element definitions. See SAE TA-HB-0007-1, Logistics Product Data Summaries Handbook for summary definitions.
E.4	In-Service Support	DI-MISC-80711A	Scientific and Technical Reports	

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TABLE A-I. Suggested DIDs per each activity - Continued

F.1	Supportability and Suitability Test, Evaluation, Verification and Validation	DI-MISC-80711A DI-SESS-81758A DI-SESS-81759A DI-PSSS-82353	Scientific and Technical Reports Logistics Product Data Logistics Product Data Summaries Product Support Analysis Package	These data requirements should be coordinated with other system test planning and reporting requirements. See SAE GEIA-STD-0007, Logistics Product Data for data element definitions. See SAE TA-HB-0007-1, Logistics Product Data Summaries Handbook for summary definitions.
F.2	Supportability Performance Assessment	DI-MISC-80711A DI-SESS-81758A DI-SESS-81759A	Scientific and Technical Reports Logistics Product Data Logistics Product Data Summaries	These data requirements should be coordinated with other system test planning and reporting requirements. See SAE GEIA-STD-0007, Logistics Product Data for data element definitions. See SAE TA-HB-0007-1, Logistics Product Data Summaries Handbook for summary definitions.

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APPENDIX B - ASSESSING A PROGRAM'S INTELLECTUAL PROPERTY RIGHTS AND DEVELOPING A DATA RIGHTS STRATEGY

B.1 SCOPE

B.1.1 Scope.

Programs should work within their PEOs and across their communities of interest in considering their future needs for data and data rights in a structured, focused manner in an effort to develop a Technical Data Rights Strategy (TDRS). The TDRS includes both technical data and computer software. Much of this appendix was obtained from the DoD Open Systems Architecture (OSA) Contract Guidebook. For more detailed information, please see the OSA Guidebook. As part of this appendix, programs are advised to follow the DFARS provisions and discuss their proposed approach with their legal counsel.

B.2 APPLICABLE DOCUMENTS.

B.2.1 General.

The documents listed in this section are specified in Appendix B of this handbook. This section does not include documents cited in other sections of this handbook or recommended for additional information or as examples.

B.2.2 Government documents.

The following government documents, drawings, and publications form a part of this document to the extent specified herein. Unless otherwise specified, the issues of these documents are those cited in the solicitation or contract.

DEPARTMENT OF DEFENSE INSTRUCTIONS

DoDI 5230.24	-	Distribution Statements on Technical Documents

DEPARTMENT OF DEFENSE MANUALS

DoD 5010.12-M	-	Procedures for the Acquisition and Management of Technical Data
DoDI 5010.44	-	Intellectual Property (IP) Acquisition and Licensing
DFARS Part 252	-	DFARS for Solicitations, Provisions, and Contract Clauses
NAVSEA SL150-AA-PRO-010/DMP	-	Operations and Procedures Manual for Contractor Prepared Data

DEPARTMENT OF DEFENSE GUIDEBOOKS

Better Buying Power: Understanding and Leveraging Data Rights in DoD Acquisitions
DoD Open Systems Architecture Contract Guidebook

SOLICITATION FORMS

SF-33	-	Solicitation, Offer and Award
SF-1449	-	Solicitation/Contract/Order for Commercial Items

FEDERAL PUBLICATION

FAR Part 2 - Federal Acquisition Regulations System (FARS)

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B.3 DATA RIGHTS

B.3.1 DoD Data Rights Guidance.

DoDI 5000.02, Under Secretary of Defense (Acquisition, Technology and Logistics) in a Memorandum on Data Management and Technical Data Rights directed programs to take a number of steps related to identifying and managing their intellectual property. The following is a summary of these requirements:

a. PMs for Acquisition Category (ACAT) I and II programs, regardless of planned sustainment approach, will assess the long-term technical data and computer software data needs of their systems and reflect that assessment in a Data Management or Data Rights Strategy (DMS or DRS).

b. Be integrated with other life cycle sustainment planning and included in the Acquisition Strategy (AS).

c. Assess the data required to design, manufacture and sustain the system as well as to support re-competition for production, sustainment or upgrade.

d. Address the merits of including a priced contract option for the future delivery of data and data rights not acquired upon initial contract award and will consider the contractor's responsibility to verify any assertion of restricted use and release of data.

e. The DRS will be approved in the context of the AS prior to issuing a contract solicitation.

B.3.2 DFARS Data Rights Guidance.

Subsequent language included in DFARS 207.106 (S-70) Additional Requirements for Major Systems specifically states: (S-70)(1) In accordance with Section 802(a) of the National Defense Authorization Act for Fiscal Year 2007 (Pub. L. 109-364) and DoD policy requirements, acquisition plans for major systems and subsystems of major systems should:

a. Assess the long-term technical data and computer software needs of those systems and subsystems.

b. Establish acquisition strategies that provide for the technical data and computer software deliverables and associated license rights needed to sustain those systems and subsystems over their life cycle. The strategy may include:

c. The development of maintenance capabilities within the DoD.

d. Competition for contracts for sustainment of the systems or subsystems.

e. Assessments and corresponding acquisition strategies developed under this section should:

f. Be developed before issuance of a solicitation for the system or subsystem.

g. Address the merits of including a priced contract option for the future delivery of technical data and computer software, and associated license rights, that were not acquired upon initial contract award.

h. Address the potential for changes in the sustainment plan over the life cycle of the system or subsystem.

i. Apply to systems and subsystems that are to be supported by performance-based logistics arrangements as well as to systems and subsystems that are to be supported by other sustainment approaches.

j. Apply to weapon systems and subsystems that are to be supported by performance-based logistics arrangements as well as to weapon systems and subsystems that are to be supported by other sustainment approaches.

B.3.3 Data Rights Assessment Goal

The goal of this assessment is to identify opportunities or requirements for information and information product sharing as well as “the long-term technical data (and computer software) needs of their systems” and then to structure contracts accordingly. Such an assessment should include both a cross-domain and enterprise-

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wide review of the component “marketplace”, both supply and demand. The results of this analysis should guide the program in determining the data and data rights that the contractor is required to deliver in addition to competitively priced options for additional technical data, computer software, and other IPR. For example, the Navy’s policy is to accept only assets with Government Purpose Rights (GPR) or less restrictive rights for incorporation in its asset repositories/libraries.

NOTES

1. The definitions of technical data, computer software, and computer software documentation are found in DFARS 252.227-7013 and in this handbook. The tables included in this Appendix summarize the different characteristics of each Rights Category along with criteria for their application.
2. When citing regulations such as the DFARS and FAR, dates are included where possible to reflect the most recent version of this Handbook. However, Contracting Officers and PMs should check for current clause dates before using the language in this Handbook.

B.3.4 Product Support Manager Guidebook.

The PSM Guidebook details instances of data rights and intellectual property to be utilized during the acquisition process. The following examples will detail this process.

a. The PSM should consult with the PSM IPT (including their Service Intellectual Property Subject Matter Experts (SMEs) to review the recommended logistics, maintenance and sustainment alternatives to ensure best value mix of appropriate technical data, computer software and data rights to support implementation of PSS.

b. Software Inventory supports software version visibility, PSMs assess what data rights are necessary for the DLA or the Service Life Cycle Management Command (LCMC) Item Manager (IM) or provisioner to implement software version cataloging using the Federal Supply Class for software.

c. Technical Data addresses data rights and data delivery as well as use of any proprietary data.

d. The PSM coordinates, at program inception, with an organic software engineering entity to identify intellectual property and data rights for inclusion in subsequent contracts. PSMs should collaborate with the software engineers to tailor data/license rights acquisition and ensure it is aligned with the acquisition and product support strategies. The PSM should also ensure the data rights and license management strategies are documented within the IP strategy.

e. DMSMS/Obsolescence Mitigation – The PSM should proactively ensure technical data and the accompanying data rights are available early in the acquisition framework to ensure the ability to re-manufacture items as necessary.

B.3.5 Additional Guidance.

Additional guidance on data, data rights and data management issues are available from “Acquiring and Enforcing the Government's Rights in Technical Data and Computer Software Under Department of Defense Contracts: A Practical Handbook for Acquisition Professionals” is designed to provide a practical "cradle-to-grave" handbook to acquiring technical data and computer software rights. Another resource is a NAVSEA SL150-AA-PRO-010/DMP. Additionally, DoD 5010.12-M is intended to provide data management tools necessary to minimize and standardize data requirements that will be included in DoD contracts.

NOTES

1. When reviewing a contract, first determine whether it is for commercial items or noncommercial items. This will typically be apparent from the contract cover sheet, the SF-33 form is used for noncommercial procurements and the SF-1449 is used for commercial item procurements. Images of blanks of both forms are available in FAR Part 53.3, and at https://www.gsa.gov/portal/forms/type/TOP. If in doubt as to whether commercial or noncommercial data or software is being acquired, it is helpful to review the definition of "commercial item" at FAR 2.101.

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2. The program plan and directive documentation should specify that anything that the government paid 100% of the cost to develop is available for delivery to the government with all of the developmental artifacts and unlimited usage rights. In addition, the PM should require that the deliverables be provided (or deposited) in the appropriate repository (if established), such as the Navy's SHARE repository or those made available through the DoD's Forge.mil Program.
3. DFARS 252.227-7017 requires that proposals include a table identifying and asserting use, release or disclosure restrictions claimed against the government. To help clearly understand the data rights to be provided to the government, the table should identify the technical data or software item subject to restrictions with the associated CDRL.

B.3.6 Approach.

A data rights assessment should address the following:

a. Does the government already have data rights in existing software or other deliverables that permit the government to leverage that existing software for this new contracting effort?
b. Will obtaining more than restricted/limited rights increase competition and lower life cycle costs, or increase procurement costs without adding value?
c. What are the benefits of broader data rights clauses? For example, will requiring more than restricted/limited rights reduce competition or increase procurement cost without providing value?
d. Will the government obtain at least Government Purpose Rights? If not, is the asset isolated at the lowest component level? If not, is it noncritical? If not, what is the justification for more restrictive rights than GPR?
e. Does the program require the rights to modify (update, correct, enhance, etc.) the deliverables now or in the future?
f. Will the program be required to maintain configuration control over the deliverables?
g. Has the program identified potential components and artifacts that can be provided to the offerors as GFI?
h. Does the government have the right to provide the information to third parties? If not, should the government negotiate a special license for this right?
i. Will the government be required to use special licenses? For example, to allow third parties to use or reuse GPR repository assets for a limited basis to support evaluation for potential employment in a proposed solution.

B.3.7 Points to Consider.

Points to Consider about Data Rights and Rights in Computer Software and Computer Software Documentation. There are some principles to consider when performing a data rights assessment:

a. Data rights issues are complex and require careful examination of the program's requirements and overall "fit" within the Enterprise.
b. Use proper experts to review program data rights requirements – strategy development should involve an intellectual property lawyer, a Contracting Officer and the Program Manager.
c. It is typically very expensive to acquire the broader data rights or to create additional options for software maintenance after the initial contract is in place.
d. Insufficient data rights prevent the government from using deliverables in the most optimal way.
e. Remember that data rights will impact maintenance over 30 or more years of a system's life.
f. It is important to remember that after assessing data and data right's needs, a Business Case Analysis (BCA) should be conducted to determine whether obtaining the desired rights is the correct business decision.

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B.3.8 Deferred Ordering of Technical Data or Computer Software Including Design and Development Artifacts.

There may be instances where the government would like to have access and the ability to download design artifacts and other materials that are produced during the development of software, but which have not been specifically identified in the CDRLs and Data Item Descriptions (DIDs). These materials may be in an Integrated Digital Design Environment (IDE). It is recommended that the PM use DFARS 252.227-7027, regarding deferred ordering of technical data, to obtain these materials. Reference to DFARS 252.227-7027, like reference to other FAR and DFARS clauses, should be included in Section I of the contract.

B.3.9 DFARS Guidance.

DFARS 227.7103-8(b) Deferred Delivery and Deferred Ordering of Technical Data. (b) Deferred Ordering. Use the clause at 252.227-7027, Deferred Ordering of Technical Data or 227.7203-8 for Deferred Ordering of Technical Data, when a firm requirement for a particular data item(s) has not been established prior to contract award but there is a potential need for the data. Under this clause, the Contracting Officer may order any data that has been generated in the performance of the contract or any subcontract thereunder at any time until three years after acceptance of all items (other than technical data) under the contract or contract termination, whichever is later. The obligation of subcontractors to deliver such data expires three years after the date the contractor accepts the last item under the subcontract. When the data are ordered, the delivery dates will be negotiated and the contractor compensated only for converting the data into the prescribed form, reproduction costs, and delivery costs.

NOTES

1. Figure B-1 summarizes the different characteristics of each data rights category along with criteria for their application. The definitions of technical data, computer software, and computer software documentation found in DFARS 252.227-7013 and -7014 should be referred to as the primary source of information for developing the contract language.
2. Distribution Statements required by DoDI 5230.24 do not correlate to specific data rights categories and vice versa. In most cases, the reason "Proprietary Information" will provide the basis for distribution statements B, E, or F. Data rights allocate the intellectual property interests of both government and industry according to the type of data, the use of the data, and the source of funding for the technology reflected in the deliverable. Distribution Statements may be based upon a number of additional restrictions including information security and export control. There are scenarios where a DoD program would have Unlimited Rights in a deliverable but would not want to authorize uncontrolled distribution of the deliverable because of such other restrictions and these would be reflected in Distribution Statement limitations. Conversely, a Limited Rights deliverable might have no security or export control reasons for limited distribution. However, since the deliverable was delivered with Limited Rights, the DoD program cannot distribute the deliverable outside the government generally without the developing contractor's written permission. In most cases Proprietary Rights will provide the basis for distribution statements B, E, or F.

B.3.10 Department of Defense Open Architecture Team Guidance.

“Better Buying Power: Understanding and Leveraging Data Rights in DoD Acquisitions”.

B.3.11 Other Sources of Information About Intellectual Property Rights.

The Federal Acquisition Regulations (FAR) and Defense Federal Acquisition Regulation Supplement (DFARS) are the primary sources of information regarding data and intellectual property rights. FIGURE B-1 may be useful when reviewing a proposal to make sure that the appropriate clauses are included:

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FAR/DFARS PATENT, TECHNICAL DATA, AND COMPUTER SOFTWARE CLAUSES

TD =TECHNICAL DATA CS =COMPUTER SOFTWARE ICP =ITEM, COMPONENT, OR PROCESS
CSD =COMPUTER SOFTWARE DOCUMENTATION

When to Incorporate Clauses/Provisions 252.227-	7013	7014	7015	7016	7017	7019	7028	7030	7037
Mandatory if TD for noncommercial ICP is to be delivered	X			X	X		X	X	X
Mandatory if noncommercial CS is to be delivered		X		X	X	X	X		
Mandatory if TD for commercial items is to be delivered			X						X
Strongly recommended in all solicitations	X	X	X	X	X	X	X	X	X
Strongly recommended in all contracts	X	X	X	X		X		X	X

SPECIFIC CLAUSES AND THEIR USE {SEE DFARS FOR TITLES}:
252.227-7018 - All SBIR contracts. (Do not use -7013 or -7014.)
252.227-7025 - All if access to less than unlimited rights TD/CS is anticipated. Strongly recommended in all contracts.
252.227-7026 - Voluntary clause used only to specifically identify at award TD & CS which may be ordered later.
252.227-7027 - Voluntary clause used to order additional deliverables for TD & CS "generated" during performance of the instant contract. Strongly recommended in all solicitations and contracts.
52.227-1 - All contracts and solicitations with limited exceptions.
52.227-2 - All contracts and solicitations with limited exceptions.
52.227-3 - Limited mandatory use in sealed bidding for "commercial" supplies/services & construction with many prohibitions on use.
52.227-10 - All which might result in a classified invention/patent.
52.227-11 - All R&D [DoD uses this clause with small business or nonprofit].
252.227-7038 - All R&D except when 52.227-11 used.
252.227-7039 - All if 52.227-11 is used.
252.246-7001 - Strongly urged whenever any technical data or software will be delivered under the contract. Using the clause avoids acceptance being "final" with respect to nonconforming markings. Review 246.708 and 246.710 for applicability. As of 07 Sept 2011.

FIGURE B-1. List of FAR and DFARS clauses for ordering technical data

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APPENDIX C - MIL-STD-1388-1A/TA-STD-0017/TA-STD-0017A ACTIVITY CROSS-REFERENCE

C.1 SCOPE

C.1.1 Scope.

This appendix provides a reference table illustrating the tasks, activity numbers, and titles from MIL-STD-1388-1A, SAE TA-STD-0017, and SAE TA-STD-0017A. It illustrates changes, additions, and removals as the Activities have been updated through the Standards' revisions.

C.1.2 LSA/PSA Activity Cross-Reference.

TABLE C-I. MIL-STD-1388-1A/TA-STD-0017/TA-STD-0017A Activity cross-reference

MIL-STD-1388-1A		TA-STD-0017		TA-STD-0017A	
Task	**Title**	**Activity**	**Title**	**Activity**	**Title**
100	**Program Planning and Control**		**Product Support Analysis Management, Surveillance, and Control**	**A**	**Program Management, Surveillance, and Control**
101	**Development of an Early Logistics Support Analysis Strategy**	**1**	**Product Support Strategy**	**A.1**	**Product Support Strategy**
101.2.1	Prepare Potential Supportability Objectives	**1.1**	Develop Potential Supportability Objectives	A.1.1	Develop Supportability Objectives
101.2.2	Cost Estimates	**1.2**	Identification of Cost Drivers	A.1.2	Identification and Measurement of Cost Drivers
101.2.3	Updates	**1.3**	Update the Product Support Strategy	A.1.3	Update the Product Support Strategy
102	**Logistics Support Analysis Plan**	**2**	**Product Support Planning**	**A.2**	**Product Support Analysis Planning**
102.2.1	LSA Plan	**2.1**	Product Support Analysis Plan	A.2.1	Product Support Analysis Plan (PSAP)
102.2.2	Updates	**2.2**	Plan Update	A.2.2	Plan Update
103	**Program and Design Reviews**	**3**	**Program and Design Reviews**	**A.3**	**Program and Design Reviews**
103.2.1	Establish Review Procedures	**3.1**	Design Review Procedures	A.3.1	Design Review Procedures
103.2.2	Design Reviews	**3.2**	Design Review	A.3.2	Design Review
103.2.3	Program Reviews	**3.3**	Supportability and Supportability-Related Design Reviews	A.3.3	Program Reviews
103.2.4 103.2.5	LSA Review LSA Guidance Conferences	**3.4**	PSA Technical Interchange Meeting	A.3.4	Technical Interchange Meetings
N/A	N/A	**N/A**	N/A	**A.4**	**Integrated Data Environment for Product Support (IDE-PS)**
N/A	N/A	**N/A**	N/A	A.4.1	Examine Stakeholder Information Environments
N/A	N/A	**N/A**	N/A	A.4.2	Create the Integrated Data Environment for Product Support
N/A	N/A	**N/A**	N/A	A.4.3	Update the Integrated Data Environment for Product Support
N/A	N/A	**N/A**	N/A	A.4.4	DevSecOps
N/A	N/A	**N/A**	N/A	A.4.5	Digital Thread
200	**Mission and Support Systems Definition**		**Supportability Objectives**	B	**Supportability Objectives**
201	**Use Study**	**4**	**Application Assessment**	**B.1**	**Application and Usage Assessment**
201.2.1	Supportability Factors	**4.1**	Intended Use/Capabilities	B.1.1	Intended Use/Capabilities
201.2.2	Quantitative Factors	**4.2**	Quantitative Factors	B.1.2	Quantitative Factors
201.2.3	Field Visits	**4.3**	Field Visits	B.1.3	Field Visits
201.2.4	Use Study Report and Updates	**4.4**	Intended Use/Capabilities Report	B.1.4	Intended Use/Capabilities Report
202	**Mission Hardware, Software, and Support System Standardization**	**5**	**Support System Standardization**	**B.2**	**Support System Standardization**
202.2.1	Supportability Constraints	**5.1**	Support Standardization Constraints	B.2.1	Support Resource Standardization
202.2.2	Supportability Characteristics	**5.2**	Standardization Costs	B.2.2	Standardization Costs
202.2.3	Recommended Approaches	**5.3**	Hardware/Software Standardization Approaches	B.2.3	Hardware/Software Standardization Approaches
202.2.4	Risks	**5.4**	Standardization Risks	B.2.4	Standardization Risks
203	**Comparative Analysis**	**6**	**Comparative Analysis**	**B.3**	**Comparative Analysis**
203.2.1	Identify Comparative Systems	**6.1**	Existing Products	B.3.1	Comparative Products
203.2.2	Baseline Comparative System	**6.2**	Baseline Comparative System	B.3.2	Baseline Comparative System
203.2.3	Comparative System Characteristics	**6.3**	BCS Logistics Requirements	B.3.3	BCS Logistics Requirements
203.2.4	Qualitative Supportability Problems	**6.4**	BCS Qualitative Constraints	B.3.4	BCS Qualitative Constraints
203.2.5	Supportability, Costs, and Readiness Drivers	**6.5**	BCS Drivers	B.3.5	BCS Supportability, Costs, and Readiness Drivers
203.2.6	Unique System Drivers	**6.6**	Identify Subsystems With no BCS	B.3.6	Unique System Drivers
203.2.7	Updates	**6.7**	BCS Updates	B.3.7	BCS Updates

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Task	**Title**	**Activity**	**Title**	**Activity**	**Title**
203.2.8	Risks and Assumptions	**6.8**	BCS Risks	B.3.8	BCS Risks
204	**Technological Opportunities**	**7**	**Technological Opportunities**	**B.4**	**Technological Opportunities**
204.2.1	Recommended Design Objectives	**7.1**	Identify Potential Technology	B.4.1	Identify Potential Technology
204.2.2	Update	**7.2**	Update Design Objectives	B.4.2	Update Design Objectives
204.2.3	Risks	**7.3**	Technology Risks	B.4.3	Technology Risks
205	**Supportability and Supportability-Related Design Factors**	**8**	**Supportability and Supportability-Related Design Factors**	**B.5**	**Supportability and Supportability-Related Design Factors**
MIL-STD-1388-1A		TA-STD-0017		TA-STD-0017A	
Task	**Title**	**Activity**	**Task**	**Title**	**Activity**
205.2.1	Supportability Characteristics	**8.1**	Operations and Support Capabilities	B.5.1	Supportability Characteristics
205.2.2	Sensitivity Analysis	**8.2**	Sensitivity Analysis	B.5.2	Sensitivity Analysis
205.2.3	Identify Proprietary Data	**8.3**	Data Rights	B.5.3	Intellectual Property (IP) and Data Rights
205.2.4	Supportability Objectives & Associated Risks	**8.4**	Capability Risks	B.5.4	Identify Risks
205.2.5	Specification Requirements	**8.5**	Key Performance Parameters	B.5.5	Key Performance Parameters
205.2.6	NATO Constraints	**8.6**	Market Limitations	B.5.6	Market Limitations
205.2.7	Supportability Goals and Thresholds	**8.7**	Update Key Performance Parameters	B.5.7	Update Objectives, Goals, and Thresholds
N/A	N/A	**N/A**	N/A	B.5.8	Advanced Manufacturing
300	**Preparation and Evaluation Of Alternatives**		**Preparation and Evaluation of Alternatives**	**C**	**Preparation and Evaluation of Alternatives**
301	**Functional Requirements Identification**	**9**	**Functional Requirements**	**C.1**	**Functional Requirements**
301.2.1	Functional Requirements	**9.1**	Identify Functions	C.1.1	Functional Requirement Identification
301.2.2	Unique Functional Requirements	**9.2**	Unique Item Functions	C.1.2	Unique Item Functions
N/A	N/A	**9.3**	Function Drivers	C.1.3	Function Drivers
301.2.3	Risks	**9.4**	Function Risks	C.1.4	Function Risks
N/A	N/A	**N/A**	N/A	C.1.5	Failure Modes and Effects Analysis (FMEA)
301.2.4	Operations and Maintenance Tasks	**9.5**	Failure Mode, Effects, and Criticality Analysis	C.1.6	Failure Mode, Effects, and Criticality Analysis (FMECA)
N/A	N/A	**9.6**	Fault Tree Analysis	C.1.7	Fault Tree Analysis (FTA)
301.2.4	Operations and Maintenance Tasks	**9.7**	Reliability-Centered Maintenance Analysis	C.1.8	Maintenance Analysis (RCM)
301.2.4	Operations and Maintenance Tasks	**9.8**	Task Inventory	C.1.9	Task Inventory
301.2.5	Design Alternatives	**9.9**	Design Alternatives	C.1.10	Design Alternatives
301.2.6	Updates	**9.10**	Function Updates	C.1.11	Function Updates
302	**Support System Alternatives**	**10**	**Support System Alternatives**	**C.2**	**Support System Alternatives**
302.2.1	Alternative Support Concepts	**10.1**	Support Alternatives	C.2.1	Alternative Support Concepts
302.2.2	Support Concept Updates	**10.2**	Update Support Alternatives	C.2.2	Support Concept Updates
302.2.3	Alternative Support Plans	**10.3**	Viable Support Plans	C.2.3	Alternative Support Plans
302.2.4	Support Plan Updates	**10.4**	Updated Viable Support Plans	C.2.4	Support Plan Updates
302.2.5	Risks	**10.5**	Support Plan Risks	C.2.5	Support Plan Risks
303	**Evaluation of Alternatives and Tradeoff Analysis**	**11**	**Evaluation of Alternatives and Tradeoff Analysis**	**C.3**	**Evaluation of Alternatives and Tradeoff Analysis**
303.2.1	Tradeoff Criteria	**11.1**	Tradeoff Analysis	C.3.1	Tradeoff Criteria
303.2.2	Support System Tradeoffs	**11.2**	New/critical Support Tradeoffs	C.3.2	Support System Tradeoffs
303.2.3	System Tradeoffs	**11.3**	Design/Support Tradeoffs	N/A	
303.2.4	Readiness Sensitivities	**11.4**	Sensitivity of Support Tradeoffs	C.3.3	Sensitivity of Support Tradeoffs
303.2.5	Manpower and Personnel Tradeoffs	**11.5**	Manpower/Personnel Tradeoffs	C.3.4	Manpower/Personnel/Training Tradeoffs
303.2.6	Training Tradeoffs	**11.6**	Job/Duty Tradeoffs	C.3.5	Job/Duty Tradeoffs
303.2.7	Level of Repair Analysis	**11.7**	Level of Repair Analysis	C.3.6	Level of Repair Analysis
303.2.8	Diagnostics Tradeoffs	**11.8**	Diagnostics Tradeoffs	C.3.7	Diagnostics Tradeoffs
303.2.9	Comparative Evaluations	**11.9**	BCS/New Product Tradeoffs	C.3.8	BCS/New Product Tradeoffs
303.2.10	Energy Tradeoffs	**11.10**	Energy Tradeoffs	C.3.9	Energy Tradeoffs
303.2.11	Survivability Tradeoffs	**11.11**	Damage/Repair Tradeoffs	C.3.10	Damage/Repair Tradeoffs
303.2.12	Transportability Tradeoffs	**11.12**	Transportability Tradeoffs	C.3.11	Transportability Tradeoffs
303.2.13	Support Facility Tradeoffs	**11.13**	Facility Tradeoffs	C.3.12	Facility Tradeoffs
400	**Determination of Logistic Support Resource Requirements**		**Determinations of Product Support Resource Requirements**	**D**	**Determination of Product Support Resource Requirements**
401	**Task Analysis**	**12**	**Task Analysis**	**D.1**	**Task Analysis**
401.2.1	Task Analysis	**12.1**	Task Analysis	D.1.1	Conduct Task Analysis
401.2.2	Analysis Documentation	**12.2**	Document Task Analysis	D.1.2	Document Task Analysis
401.2.3	New/Critical Support Resources	**12.3**	New/Critical Resources	D.1.3	New/Critical Resources
401.2.4	Training Requirements and Recommendations	**12.4**	Training Requirements	D.1.4	Training and Performance Support Requirements
401.2.5	Design Improvements	**12.5**	Design Influence	D.1.5	Design Influence
401.2.6	Management Plans	**12.6**	Risk Reduction	D.1.6	Risk Reduction
401.2.7	Transportability Analysis	**12.7**	Transportability Analysis	D.1.7	Transportability Analysis

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Task	**Title**	**Activity**	**Title**	**Activity**	**Title**
401.2.8	Provisioning Requirements	**12.8**	Supply Support	D.1.8	Supply Support
401.2.9	LSAR Validation		Not available		Not available
401.2.10	ILS Output Products	**12.9**	Logistics Products	D.1.9	Logistics Products
401.2.11	LSAR Updates	**12.10**	Task Analysis Updates	D.1.10	Task Analysis Updates
401.2.12	Provisioning Screening	**12.11**	Parts Screening	D.1.11	Parts Screening
N/A	N/A	**N/A**	N/A	D.1.12	Environment, Safety and Occupational Health (ESOH) Analysis
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Task	**Title**	**Activity**	**Task**	**Title**	**Activity**
402	**Early Fielding Analysis**	**13**	**Early Distribution Analysis**	**D.2**	**Early Distribution and Fielding Analysis**
402.2.1	New System Impact	**13.1**	New Product Impacts	D.2.1	System Impacts
402.2.2	Sources of Manpower and Personnel Skills	**13.2**	Impacts on Manpower	D.2.2	Impacts on Manpower and Personnel
402.2.3	Impact of Resource Shortfalls	**13.3**	Readiness Impacts	D.2.3	Readiness Impacts
402.2.4	Combat Resource Requirements	**13.4**	Survivability Analyses	D.2.4	Survivability Analyses
402.2.5	Plans for Problem Resolution	**13.5**	Impact Solutions	D.2.5	Impact Solutions
N/A	**N/A**		**Product Operational Management**	**E**	**Product Operational In-Service Support**
N/A	**N/A**	**14**	**Diminishing Manufacturing Sources and Material Shortages Management (DMSMS)/ Obsolescence Analysis**	**E.1**	**DMSMS Management, Obsolescence Management, and Counterfeit Prevention**
N/A	N/A	**14.1**	DMSMS/Obsolescence	E.1.1	DMSMS and Obsolescence Management
N/A	N/A	**N/A**	N/A	E.1.2	Counterfeit Prevention
403	**Post Production Support Analysis**	**15**	**Field Feedback**	**E.2**	**Field Feedback**
403.2	Post Production Support Analysis Plan	**15.1**	Feedback Sources	E.2.1	Feedback Sources
403.2	Post Production Support Analysis Plan	**15.2**	Feedback Analysis	E.2.2	Feedback Analysis
N/A	N/A	**N/A**		E.2.3	Management of Reliability Drivers through Failure Reporting Analysis and Corrective Action System (FRACAS)
N/A	**N/A**	**16**	**Disposal Analysis**	**E.3**	**Disposal Analysis**
N/A	N/A	**16.1**	Component Disposal	E.3.1	Component Disposal
N/A	N/A	**16.2**	Product Disposal	E.3.2	Product Disposal
N/A	N/A	**N/A**	N/A	**E.4**	**In-Service Supportability**
N/A	N/A	**N/A**	N/A	E.4.1	Supportability in Mission Planning
N/A	N/A	**N/A**	N/A	E.4.2	Supportability in Engineering Change
500	**Supportability Assessment**		**Suitability Assessment**	**F**	**Supportability and Suitability Assessment**
501	**Supportability Test, Evaluation, and Verification**	**17**	**Operational Suitability Test, Evaluation, Verification and Validation**	**F.1**	**Supportability and Suitability Test, Evaluation, Verification and Validation**
501.2.1	Test and Evaluation strategy	**17.1**	Test Strategy	F.1.1	Test and Evaluation Strategy
501.2.2	System Support Package Component List	**17.2**	Product Support Package	F.1.2	Product Support Package (PSP)
501.2.3	Objectives and Criteria	**17.3**	Test Objectives/Resources	F.1.3	Test Objectives/Resources
		17.4	Conduct Tests	F.1.4	Validation
N/A	N/A	**17.5**	Analyze Test Results	F.1.5	Analyze Test Results
N/A	**N/A**	**N/A**	**N/A**	**F.2**	**Supportability Performance Assessment**
N/A	N/A	**N/A**	N/A	F.2.1	Establish Performance Measurement Framework
N/A	N/A	**N/A**	N/A	F.2.2	Measure and Compile Supportability Performance Data
N/A	N/A	**N/A**	N/A	F.2.3	Analyze Performance Levels
N/A	N/A	**N/A**	N/A	F.2.4	Propose Changes to Support Solution
N/A	N/A	**N/A**	N/A	F.2.5	Update performance measurement framework, PSP, and LPD

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APPENDIX D - LOGISTICS PRODUCT DATA SUMMARIES

D.1. SCOPE

D.1.1 Scope.

This appendix provides a short description of each summary in SAE TA-HB-0007-1A.

D.2.1 LPD Summary List.

Table D-I. LPD Summaries

Summary	Title	Description
LSA-001	Annual Man Hours by Skill Specialty Code and Level of Maintenance	The LSA-001 summarizes the training and personnel requirements identified for each maintenance task. It provides the analyst with a one or two-page summary of the total Operations and Maintenance man-hours required to support the weapon system.
LSA-003	Maintenance Summary	The intent of this summary is to compare the status of an item versus the requirements for the same item. LSA-003 compares the required manpower plan or budget with the calculated requirements for manpower based on tasks to be performed.
LSA-004	Maintenance Allocation Chart	The LSA-004 is a summary of the man-hour allocations by maintenance function and maintenance level. The Maintenance Allocation Chart (MAC) can be produced directly from the LSA-004, Maintenance Allocation Chart Summary.
LSA-005	Support Item Utilization Summary	This summary shows the use of the item by maintenance level and should be used to justify the requirement for support equipment and determine the quantity and distribution requirements. The summary should also be used to determine recommended order quantities of repair parts based on their total use.
LSA-006	Critical Maintenance Task Summary	The summary provides a list of all maintenance tasks which exceed a specific value for Task Frequency, or elapsed time, or man-hours, or annual man-hours. This summary should be used to pinpoint problem areas and plan maintenance for critical components.
LSA-007	Support Equipment Requirements	LSA-007 is a summary of all support equipment (i.e., tools, test equipment, etc.) utilized by Skill Specialty Code and level of maintenance. The summary may be selected for any maintenance level or combination of levels. This summary should be used to develop tool kits for each skill specialty at each level of maintenance.
LSA-008	Support Items Validation Summary	LSA-008 provides a listing of support items required to support/perform the task at each maintenance level. It is used to review support item requirements for the maintenance and operator task(s) involved.
LSA-009	Support Items List	LSA-009 provides a list of all repair parts, tools, and test equipment necessary to support the system. It is used to provide information necessary to assist in the provisioning process.
LSA-010	Parts Standardization Summary	LSA-010 is a summary, by reference number, of all spare and repair parts comprising the system/equipment. It can be utilized to assist in performance of required Defense Standardization Program (DSP) Procedures and DoD Replenishment Parts Breakout Program. Additionally, parts standardization and planning provide programs visibility of obsolescence risk and assure integrity in the Defense Logistics Agency's demand planning role.
LSA-011	Requirements for Special Training	LSA-011 is a summary of all operator or maintenance tasks, which have been identified as requiring a special training device and the narrative explanation of the training equipment requirement. The summary should be used to identify the requirements, and provide justification, for the acquisition of training devices.
LSA-012	Facility Requirements	The summary should be used by IPS managers to justify new or modified facility requirements such as Facility Design Criteria, Facility Installation Lead Time, Facility Task Area Breakdown, Facility Utilization, Facility Requirements, Facility Unit Cost Rationale, Facility Justification, Type of Construction, and Utilities Requirement. It is used to identify the facilities needed to do maintenance tasks and training. It can also be used by the services to develop their service peculiar facility requirements.
LSA-013	Support Equipment Grouping Number Utilization	LSA-013 should be used to provide the requirements, quantity, and justification for the acquisition of support equipment. The summary provides an alternate view of support equipment; for instance, by function rather than by part number.
LSA-014	Training Task List	The LSA-014 summary is used to summarize the data captured during maintenance task analysis including training location needs and provides a rationale for both the training type and the training location. This summary is typically used as input to maintenance concepts, maintenance plans and to develop training programs.

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Summary	Title	Description
LSA-016	Preliminary Maintenance Allocation Chart	The Preliminary Maintenance Allocation Chart (PMAC) is a preliminary report of task allocation by maintenance function and maintenance level, and a preliminary report of tools, equipment, and spares/repair parts required by task function and maintenance level. The report is used to identify tools and equipment by maintenance levels to perform the maintenance functions, and to validate Source, Maintenance, and Recoverability (SMR) Codes for spares and repair parts.
LSA-018	Task Inventory Summary	LSA-018, Task Inventory Summary, provides a listing of all tasks performed by system personnel to operate and maintain the item. It can be used to develop a Task Inventory list. This summary should be used when there is a need for the development of a task performance analysis and used by the Human System Integration (HSI) community for workload analysis.
LSA-019	Task Analysis Summary	LSA-019 displays the task narrative data and can be used as feeder data to the task skills analysis for Manpower, Personnel and Training. The narrative is used in the development of Technical Manuals.
LSA-020	Task Narrative	LSA-020 displays the task narrative and associated subtasks required to complete maintenance action for the primary task. This report will help you validate the task steps within a maintenance action. Tasks are identified by Task Code, Task Identification and LCN/ALC. Subtasks are listed below by Subtask Code and Sequential Task Narrative.
LSA-021	Event Trigger Preventive Maintenance Task Analysis	The Event Trigger Preventive Maintenance Task Analysis summary allows users to identify initial and subsequent scheduled events. These events are separated by task code and task identification. Measurements that are also found in the summary include task frequency, Initial and Subsequent schedule interval, sampling value and sampling description.
LSA-022	Circuit Breaker Tasks	The LSA-022 summary provides information on the circuit breaker requirements which are needed in support of equipment. The summary outlines the circuit breaker locations along with the accompanying caution/warning and notes for the specific circuit breakers. Part II outlines the Skill Specialty Code which is required for a specific maintenance action along with the quantity per task and subtask.
LSA-023	Maintenance Plan Summary (Air Force)	This summary was originally developed for the Air Force and has since become the comprehensive report for logisticians. It identifies required reliability, the achieved reliability, the list of maintenance actions, the spares and support equipment required to maintain the item.
LSA-024	Maintenance Plan Summary (Navy/ Marines)	The LSA-024 satisfies the requirements for a U.S. Navy maintenance plan. The U.S. Navy and U.S. Marine Corps use the LSA-024, Maintenance Plan, as the primary planning, analysis, and review tools for maintenance requirements. The summary contains the maintenance concept for each reparable or maintenance-significant consumable
LSA-025	Packaging Requirements Data	LSA-025 is a summary of the basic data requirements for preservation and packing for military and commercial items. This summary consists of four 80-character card record formats DD Form 2326 of packaging information as specified by MIL-STD-2073-1. The summary should be used to provide adequate packaging instructions for DoD users.
LSA-026	Packaging Developmental Data Summary	LSA-026 summary is used to identify requirements for packaging developmental data. It contains basic identification data [i.e., Shelf Life (SL), Hazardous Code, Physical Security Pilferage Code (PSPC)] and SMR to determine if reusable containers are required for packaging development.
LSA-027	Failure/Maintenance Rate Summary	LSA-027 identifies an item and annual operating requirements by LCN and Task Code. This summary should be used to provide information necessary to monitor failure rates, failure modes, task frequencies, and Maintenance Replacement Rates (MRRs).
LSA-030	Indentured Parts List Summary	LSA-030, Indentured Parts List. This summary consists of four different summaries related to the parts related to a product. The four types of summaries are: Draft Repair Parts and Special Tools List (RPSTL), Proof RPSTL, Illustrated Parts Breakdown (IPB) and Stockage List Type Four (USMC only).
LSA-032	Defense Logistics Agency Logistics Information Services Provisioning Screening Summary	This summary provides a method to screen the Federal Logistics Information System (FLIS) for existing National Stock Numbers (NSNs) that match reference numbers associated with the system being provisioned. The NSNs identified by this summary can then be used to update logistics product data.
LSA-033	Preventive Maintenance Checks and Services Summary	The Preventive Maintenance Checks and Services (PMCS) are required for the operator and organizational level Technical Manuals and are based on the results of the reliability-centered maintenance analysis.
LSA-036	Provisioning Requirements Summary	This summary contains the data required for the accomplishment of initial and follow-on provisioning within the DoD. It contains that data required for review at the various provisioning conferences and is used in the selection procedures to identify repair parts requirements in support of the equipment to be fielded.

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Summary	Title	Description
LSA-037	Spares and Support Equipment Identification List	The purpose of the LSA-037 is to provide information that identifies the investment spares (Section A), expense spares (Section B), support equipment (Section C), and tools and test equipment (Section D) required for system support under contractor logistic support.
LSA-039	Critical and Strategic Item Summary	LSA-039 is a summary of items assigned a Critical Item Code (CIC) or Industrial Materials Analysis of Capacity (IMAC) code. This summary can also be an input in developing a Diminishing Manufacturing Sources and Material Shortages (DMSMS) program.
LSA-040	Authorization List Items Summary	The LSA-040 comprises the Authorization List Items Summary which includes sections listing end item components, basic issue items, additional authorization items and expendable/durable supplies and materials.
LSA-046	Nuclear Hardness Critical Item (HCI) Summary	This summary provides a listing of all support items which are coded as nuclear hardness critical. The parts identified by HCI are required to withstand Electromagnetic Pulses.
LSA-050	Reliability-Centered Maintenance Summary	The LSA-050 can be used as source data for a final RCM summary. The RCM summary identifies preventive maintenance tasks by evaluating maintenance required for an item by its reliability characteristics.
LSA-051	RCM Logic Tree Summary	The LSA-051 lists all logic tree questions, their answers, final dispositions, and reasoning for an item under analysis. This summary is used when a preventive maintenance task analysis program has used one of the available RCM methodologies (i.e., MSG-3, MIL-STD-3034A, etc.). This summary provides insight into the step-by-step process for identifying a preventive maintenance candidate.
LSA-055	Failure Mode to Task Comparison	This summary provides a cross reference of the maintenance tasks to failure mode. The summary can be used to identify failures that have maintenance actions, failures that have yet to have a corresponding maintenance action, and those maintenance actions that affect no failure at all.
LSA-056	Failure Mode, Effects, and Criticality Analysis (FMECA) Summary	LSA-056 should be used to identify the effects and results of a potential failure on the system. The first part contains FMECA, maintainability information, Damage Mode and Effects Analysis (DMEA) and minimum equipment listing information. The second part is the Criticality Analysis, which is a listing in descending order of each item's computed criticality number or failure mode criticality number, with probability and failure mode ratios by safety hazard severity code.
LSA-058	Reliability and Maintainability Analysis Summary	The LSA-058 summary can be used as source information for any type of Reliability and Maintainability (R&M) summary. It also can be used as a quick overview of most of the R&M type information.
LSA-065	Manpower Requirements Criteria (MARC) Summary	The data elements on the LSA-065 summary assist management in making decisions and developing the required manpower summaries. The Manpower Estimate is approved by the DoD Component Manpower Authority and serves as the authoritative source for reporting manpower in other program documentation.
LSA-068	Task Code to SMR Code Verification Summary	This summary provides a cross reference of the SMR codes assigned to repair and spare parts identified in each of the maintenance tasks. The summary can be used to verify that the levels of maintenance for replace and repair within the SMR code matches to the maintenance task that identifies the usage of the repair or spare part.
LSA-070	Support Equipment Recommendation Data Summary (SERD)	The SERD is the contractor's recommendation for SE to support the contract end article. The completed SERD is intended to support overall systems management action for SE development, acquisition, and optimum standardization within and among systems.
LSA-071	Support Equipment Candidate List Summary	The LSA-071, Support Equipment Candidate List, provides a consolidated list of the support equipment candidates which were accepted and rejected. This summary aids in the development of the PSA Strategy, maintenance plan and Support Equipment Requirements Data (SERD) summary. Approved SECL items become part of the SERD.
LSA-072	Test, Measurement, and Diagnostic Equipment Requirements Summary	This summary provides a two-part summary of Test, Measurement, and Diagnostic Equipment (TMDE) requirements and technical descriptions to verify the applicability of the test equipment for use on the weapon system/end item. LSA-072, TMDE Requirements Summary, may be used to propose entry of a new item of TMDE into a service TMDE Register.
LSA-074	Support Equipment Tool List Summary	LSA-074 provides a four-part summary of all stock listed, commercial, modified, or developmental tools required. It provides a list of tools currently in the inventory and tools that are not in the inventory but need to be developed.
LSA-075	Consolidated Manpower, Personnel and Training Summary	LSA-075 provides a depiction of critical manpower and personnel data by maintenance level and new/modified skill requirements needed as a baseline for performing hardware-manpower requirements analysis.
LSA-076	Calibration and Measurement	This summary details TMDE and the calibration standards and equipment required to assure traceability of measurements through the required metrology and calibration programs to approved National Standards as specified by MIL-STD-1839.

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Summary	Title	Description
	Requirement Summary (CMRS) Summary	
LSA-077	Depot Maintenance Interservice Data Summary	LSA-077 is used to justify the need for support equipment and determine quantity and distribution requirements; develop tool kits for each skill specialty at each depot; determine recommended order quantities of repair parts; and provide the basis for recommending specific tasks for training.
LSA-078	Hazardous Material Summary	The LSA-078 can facilitate efforts to eliminate or reduce hazardous materials during the system design process and manage those hazardous materials that could not be eliminated from the design of the end item. If required, it provides information regarding the associated hazardous material's storage and hazardous waste storage or disposal costs.
SA-080	Bill of Materials Summary	Part I (Parts List) identifies each assembly and provides a listing of the items related to or contained in the assembly. The summary provides a vehicle for comparing the data against the assembly drawings to ensure items in the top-down breakdown of the assembly is contained in the LPD data entities. Part II (Error Listing) is automatically produced when the LSA-080 is requested.
LSA-085	Transportability Summary	The Transportability Summary provides information critical to the shipping and transport of major end items of equipment. It includes environmental and hazardous material information necessary for safe transport of an item by air, highway, rail, and sea.
LSA-126	Indenture Structure Tree Summary	This summary provides a concise summary of information pertaining to a system/equipment breakdown. Each item is blocked in and indented to the proper level in the hardware family tree and displayed by line relationship beneath the appropriate assembly in which the item is contained.
LSA-151	Provisioning Parts List Index Summary	This summary provides a cross reference between reference numbers and the applicable PLISN of the provisioning list as required by SAE GEIA-STD-0007C. It provides a ready reference of usage and location within the provisioning list for a given reference number. The summary can be generated in reference number, LCN, or PLISN sequence.
LSA-152	PLISN Assignment/ Reassignment Summary	This summary provides a listing, by reference number, of PLISN, Indenture Code (IC), NHA PLISN, and PRIOR ITEM PLISN, assigned by the data repository based on parameters of the assignment select card. The summary is automatically produced and will depict the file content before and after the assignments or reassignments are made.
LSA-154	Provisioning Parts Breakout Summary	LSA-154, Provisioning Parts Breakout Summary, identifies critical pricing and parts breakout program information including selected parts application data. This summary can be used as source data for the Parts Management Program as specified by MIL-STD-3018.
LSA-155	Recommended Spare Parts List for Spare Acquisition Integrated with Production (SAIP) Summary	LSA-155 provides the data for a Spares Acquisition Integrated with Production (SAIP) list when required by FAR Part 217, Special Contracting Methods.

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CONCLUDING MATERIAL

Custodians:
Army – TM
Navy – AS
Air Force – 10

Preparing activity:
Army – TM
(Project PSSS-2024-024)

Review activities:
Army – AV, CR, MI, PT,
Navy – MC, SH,
Air Force – 1, 11

NOTE: The activities listed above were interested in this document as of the date of this document. Since organizations and responsibilities can change, the currency of the information above should be verified using the ASSIST Online database at https://assist.dla.mil

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