

Statement of Work/Statement of Objectives Guide

1 SCOPE

1.1 Background. This guide applies to the preparation of Statements of Work (SOWs) for projects that have deliverables and/or services performed. The FAR discusses the essentiality of the SOW for sound contracting. An offeror submits a proposal based on his perception of the Government's needs as defined in the solicitation. Precisely stated requirements will enable the offeror and the Government to negotiate a fair price for the deliverables and/or services to be provided. This guide has been developed as a framework to assist in providing a consistent, orderly, and complete description of work required.

1.2 Importance of SOW. The majority of government services contracts include a SOW which forms the basis for successful performance by the contractor and effective administration of the contract by the government. A well-written SOW enhances the opportunity for all potential offerors to compete equally for Government contracts and serves as the standard for determining if the contractor meets the stated performance requirements.

1.3 Introduction of Statement of Objectives (SOO). This document introduces a new concept called the SOO which shifts the responsibility for preparing the SOW from the government to the solicitation respondents. The SOO captures the top level objectives of a solicitation and allows the offerors complete freedom in the structure and definition of SOW tasks as they apply to the proposed approach; however, the requirement, content and purpose of the SOW in the contract remain unchanged. The SOO concept is explained in detail in Section 5.

2 GENERAL DESCRIPTION

2.1 Purpose. The SOW should specify in clear, understandable terms the work to be done in developing or producing the goods to be delivered or services to be performed by a contractor. Preparation of an effective SOW requires both an understanding of the goods or services that are needed to satisfy a particular requirement and an ability to define what is required in specific, performance-based, quantitative terms. A SOW prepared in explicit terms will enable offerors to clearly understand the government's needs. This facilitates the preparation of responsive proposals and delivery of the required goods or services. A well-written SOW also aids the Government in conduct of the source selection and contract administration after award.

2.2 Relationship Between the SOW and Contract. The SOW should be compatible with these provisions:

- Requirements that are mandated by law, established via policy, or necessary for effective management of its acquisition, operation, or support.
- The SOW should state requirements in terms of results needed rather than "how to manage" procedures for achieving those results.

2.3 SOW and Contractor Performance. After contractor selection and contract award, the contract SOW becomes a standard for measuring contractor performance. Consequently, the SOW writer must consider the contractual and legal implications of the SOW during its preparation. As the contracted effort progresses, the government and the contractor will refer to the SOW to determine their respective rights and obligations. In this respect, the SOW defines the contract and is subject to the interpretations of contract law. The SOW must clearly define the work to be performed, since the language detailing the contractor's effort may be pertinent to legal questions concerning the scope of work. In a dispute concerning performance, rights, or obligations, clearly defined requirements will enhance the legal enforceability of a SOW.

2.4 Relationship of Contract Sections. The government solicitation defines the government's requirements. Therefore, the SOW must be consistent with all sections of the solicitation. The SOW preparer should work closely with the overall solicitation drafter and all contract section authors to achieve consistency. If acceptance and inspection of supplies or services is required to satisfy the contract, commercial contracts will state the acceptance criteria in FAR 52.212-4. For non-commercial contracts, the solicitation Section E should address the acceptance criteria. Clauses required by law, regulation, or any other clauses that may apply to a resulting contract and are listed in FAR 52.212-4 and 52.212-5. For non-commercial contracts, these clauses are cited in Section I (Contract Clauses). Exhibits and attachments will be attached to a commercial contract and listed in addenda. For non-commercial contracts, Section J is a listing of all exhibits and attachments to the contract. For commercial contracts, FAR 52.212-3 includes offeror representations and certifications. For non-commercial contracts, Sections K, L, and M apply only to solicitations. They are contained at the end so that when the contract is awarded, they can be removed. Section K includes provisions that require representations, certifications, or the submission of other information by offerors. Section L includes provisions and other information or instructions to guide bidders/offerors in preparing their offers or bids in a manner that is responsive to the government's solicitation. For commercial contracts, FAR 52.212-2 identifies the evaluation criteria listed in order of importance, and other factors for award. For non-commercial contracts, Section M identifies the factors that will be considered in awarding the contract.

2.5. SOW Do's and Don'ts.

a. Do's:

- Select a competent team with an experienced team leader.
- Exclude “how to” requirements since the offeror should be tasked to provide the deliverables under the contract in the most cost-effective manner.
- Set SOW objectives in support of the Acquisition Plan (AP), if applicable.
- Explicitly define the tailored limitations of all standards and specifications cited.

- Exclude design control or hardware performance parameters because these requirements should be covered in a specification.
- Educate personnel with respect to acquisition streamlining.
- Give priority to commercial items over specification items when the former satisfies requirements.
- Give priority to commercial practices as a means of acquisition.

b. Don'ts:

- Impose on the contractor a Government format when a contractor format is acceptable.
- Overspecify. Specify only what is required and let the contractor establish the best method to fulfill the requirement.
- Invoke in-house management instructions.

2.5.5 Title Page and Table of Contents. All SOWs should have a title page or cover that shows the SOW title, preparation date, procurement request number or contract number, revision number, date, and identity of the preparing organization . A table of contents should be used when the SOW exceeds five pages.

2.6 Paragraph Numbering and Identification. Each paragraph and subparagraph should be numbered consecutively within each SOW Section using a period to separate the number representing each sublevel. Paragraph numbering should be limited to the third sublevel, if possible, as shown in the following example for SOW Section 3:

Requirement	3
1st Sublevel	3.1
2nd Sublevel	3.1.1
3rd Sublevel	3.1.1.1

Paragraph breakdowns should be kept to that level necessary to clearly define required contractor tasks. Only one task should be provided in a numbered paragraph or sub paragraph to facilitate costing, referencing and tailoring of tasks. Each paragraph and sub-paragraph should be titled.

**DEPARTMENT OF VETERANS AFFAIRS
Austin Automation Center**

Request for Proposal (RFP)

Customization Support for PeopleSoft Products

For

Customer: HR LINK\$

Issue Date: March 3, 1999

Direct all inquiries to:

Sample Title Page.

2.7 Language Style. SOW requirements should be written in language understandable to all potential program participants. Requirements should be stated explicitly in a topical, logical, chronological, or similarly structured order, avoiding words which allow for multiple interpretations. Use technical language sparingly with simple wording predominating in concise sentences. Use "shall" whenever a provision is mandatory. "Will" expresses a declaration of purpose or intent; for example, "The Government will review all recommendations and provide direction within thirty calendar days". Use active rather than passive voice; for example, "The contractor shall establish a program", not "A program shall be established by the contractor."

Spell out acronyms and abbreviations the first time and put the abbreviated version in parentheses after the spelled-out phrases. This will define them for each subsequent use. Acronyms and abbreviations may be defined in a glossary.

Use verbs that identify work and performance task requirements (See Appendix A) and answer the explicit question: "What are the work requirements?" When selecting the appropriate work word which properly expresses the degree of contractor involvement, the SOW writer must explicitly define the total nature of the work requirement.

Avoid using "Any," "Either," "And/Or," as these words imply that the contractor can make a choice which may not support the intent of the SOW. Do not use pronouns or actual names of personnel. Repeat the noun to avoid any misinterpretation. Terminology should be consistent throughout the SOW. When referring to a specific item, use the same phrase or word, particularly when referring to technical terms and items. Where words can be spelled in several different ways, employ the most common spelling. Make every effort to avoid ambiguity. A list of ambiguous phrases is provided in Appendix B.

2.8 Report Management. As the contractor performs and completes the SOW tasks, reports may be required. Submissions of this data are generally expensive. Proper tailoring and scheduling of report deliverables requires particular attention by the SOW preparers. Reporting costs can be minimized by selectively eliminating unnecessary reports and requiring appropriately phased submissions. A review of anticipated reporting requirements should therefore include definition of a time line defined for report submission. The contractor's format may be the acceptable form for submission of report products. The SOW preparer should make every effort to ensure that the reporting requirements reflect the anticipated need for data and to ascertain whether the specific data required will in fact be generated and available prior to the proposed delivery date.

2.9 SOW Development.

- a. Ensure that only those tasks which add value to the product, whether a management system or technical requirement, are included in the SOW.
- b. Conduct market research to determine whether commercial items or non-developmental items are available to meet program requirements.
- c. Review the IRM approval documents for program management, acquisition and control impact.

- d. Identify all organizations and persons who will participate in preparing the SOW, and determine the participants' areas of responsibility.
- e. Prepare the SOW following the guidelines of this handbook. For each work element, identify tasks that define the scope of the work effort to satisfy the minimal needs of the program and identify required data deliverables.
- f. Ensure that any specifications are consistent with the SOW.

If the SOW is prepared properly, contractor monitoring can be kept to a minimum as long as the task is completed on time and within cost. This would be a proper non-personal services contract. The Government is then left with the requirement to inspect the product and either accept or reject it based on the contractor's conformance to the prescribed work requirement. The wide variety of non-personal services requirements cause this type of contract to take on many forms. However, in all applications, two factors are important to ensure that the services purchased are indeed non-personal. These factors are: (a) The SOW must establish explicitly what work is to be done and require the delivery of a product or result other than periodic progress reports, and (b) the contractor's employees must not be supervised or controlled by the Government during the execution of the work and production of the product or result. In this regard, the SOW must be explicit, inclusive and comprehensive in prescribing the work requirements.

2.10 Terminology. A frequent problem encountered in defining the tasks in an SOW is the use of non-specific words and phrases such as: "any", "assist", "as required", "as applicable/as necessary", and "as directed. Do not use any of these words. The following rationale for precluding their use is provided:

a. *Any*. "Any" is an ambiguous word. Writers may intend it to denote "plurality" and readers may interpret it to denote "oneness". Also, when "any" is used to describe the selection of items from a list, it's the reader who does the selecting, not the writer. Which items, and how many the reader selects are beyond the control of the writer.

b. *Assist*. "Assist" connotes personal services. It infers working side-by-side, being subject to supervision. The word is totally undefined in terms of identifying the work and its range and depth. Spell out explicitly what the contractor must do.

c. *As required*. The result of this approach is an undefined work condition. It has no expressed limitations. It places the Government in a position of not expressing its minimal needs. It could lead to a debatable condition concerning the contractor's compliance with the contract or order. The SOW must be declarative as to its minimal needs.

d. *As applicable/As necessary*. If the Government does not know what is necessary or applicable, it must not leave to the contractor the responsibility for determining the minimal needs of the contract. The SOW should forthrightly state the requirements so that the contractor can comply with the requirement using his best efforts and expertise to accomplish the tasks.

e. *As directed.* This condition, as a part of a work task in a SOW, connotes a personal services situation in which the contractor is placed under direct supervision. "When directed" may be used in conjunction with a task order contract to indicate that specific tasks may be initiated at various times during the period of contracted performance.

f. *Including but not limited to.* This term is generally inserted when the drafter is unsure of requirement or criteria. However, it creates an unspecific requirement which creates ambiguity. Only list known requirements.

g. *Etc.* This word also introduces potentially more unidentified ambiguous requirements.

3.0 Word Usage. Another area of concern in establishing the SOW for non-personal services is the overuse of the words and phrases "support" and "engineering and technical services".

- a. Support is an ambiguous term. Specify the specific type of support needed.
- a. The terms "engineering and technical services" encompass a broad area of expertise. The SOW must state the minimal needs, even if it means broadening the work limitations to cover anticipated work tasks. For clarification, the SOW may include some examples of typical work to be done.
- b. Perhaps one of the most vexing problems in contracting is the problem of loopholes. Contractors and inspectors go by the letter of the contract SOW. In one instance, an engineer intended to have a damaged roof edge repaired and repainted. He wrote "match existing," but did not specify "repaint." The contractors who did the work matched the existing metal flashing strip but refused to paint the new flashing. The inspector could only agree with the contractor, since the engineer had not adequately described what was intended. The writer and reviewers at all levels of review have a responsibility to ensure that loopholes do not exist in the final SOW.

EXAMPLE SOW FOR SERVICES

Statement of Work

1999 ITC

5/11/99

INTRODUCTION

1.1 Organization: Department of Veterans Affairs

1.1.1 Identification:

Department of Veterans Affairs
Austin Automation Center
1615 Woodward Street
Austin, TX 78772-0001

1.1.2 Customers: The primary customers are the VA Austin Automation Center (AAC), the Veterans Health Administration (VHA) in Washington, DC, the Veterans Benefits Administration in Washington, DC, and VA Office of Information Resource Management in Washington, DC.

1.2 Project Background and Objectives

1.2.1 Background:

Each year, the Austin Automation Center (AAC) and the Veterans Health Administration (VHA) hosts (along with oversight provided by its headquarters in Washington, DC) the Department of Veterans Affairs training conference called the Information Technology Conference (ITC). The ITC began in 1985 as a specialized conference that was held at the AAC for a specific function performed at VA medical centers (hospitals). Each year the conference has grown in size and scope such that the AAC no longer has the space or the equipment to accommodate the number of attendees. This conference now offers a wide range of hands-on training classes for all areas of VA employees (medical, fiscal, management, and benefits tracks are offered), demonstrations of new hardware/software or new applications available, and briefings that are of interest to various and/or all functional areas of VA. The training sessions may last from 1 hour up to 2 days, depending on the difficulty level of the subject matter and whether it is a demonstration or lecture, or an actual hands-on training session. Approximately 2,500-3,000 VA employees from field facilities located throughout the United States including Alaska and Hawaii, plus Puerto Rico, Manila, and the Philippines, attend this conference.

1.2.2 Objective:

This request is to contract for the technical services and personal computer resources (personal computers (PCs), PC Server, LAN and cabling equipment, and printers) and the technicians required to support the 1999 ITC. The technicians must set up and maintain at a high operational level said

personal computer equipment as detailed in floor layouts for all classrooms, lecture halls, demonstrations and information/demonstration booths. About 200 different training sessions for an estimated 2,500-3,000 conference attendees will be provided during this conference. The training facility is the Austin Convention Center located at 500 E. Cesar Chavez Street, Austin, Texas 78701.

1.3 Scope:

The Contractor shall provide, configure, deliver, set up, and test for correct operability an estimated 400 IBM compatible certified MS Windows NT and Year 2000 (Y2K) compliant personal computers/workstations beginning at 4:30 p.m. Thursday, August 5, 1999 in all rooms as designated but not limited to the attached detailed floor layouts at the Austin Convention Center, Austin Texas. Set up of these PCs shall begin at 4:30 p.m. Thursday, August 5, 1999, and all shall be operational by Saturday, August 7, 1999, at 5:00 p.m. and continue to ensure they are operational through August 13, 1999 at 5:00 p.m. The Contractor must make arrangements for any storage of equipment and supplies with the Austin Convention Center and be responsible for any related charges.

1.4 Applicable Documents:

Floor layouts of the first floor, Mezzanine level, and third floor of the Austin Convention Center (see attachment).

Application software and load specifications will be sent to the contractor under separate cover by close of business (COB) July 23, 1999.

2 WORK REQUIREMENTS

The contractor shall provide all services and equipment specified in the following paragraphs and deliver, install, test, set up and have operational all specified equipment to be delivered to the Austin Convention Center as of Saturday, August 7, 1999, 5:00 p.m. The contractor shall also provide technicians to maintain said equipment through the duration of the conference (August 13, 5:00 p.m.). Work to complete these requirements shall begin on Thursday, August 5, 1999, at 4:30 p.m. and be operational as verified by AAC tests by 5:00 p.m. on Saturday, August 7, 1999.

2.1 Technical Requirements

2.1.1 Task 1. Provide an estimated 400 PCs/workstations/servers, which shall arrive at the Austin Convention Center with the following hardware configuration:

248 each, CLIN 0001AA
133 each, CLIN 0001AB
2 each, CLIN 0001AC
1 each, CLIN 0002AA
2 each, CLIN 0002AB
2 each, CLIN 0002AC

2.1.2 Task 2.

The following software will be installed on each of the PC's for CLIN 0001 and CLIN 0002:

2.1.3 Additional equipment required:

2.1.3.1 Task 3. Provide at least 35 each of CLIN 0001AD

2.1.3.2 Task 4. Provide at least 15 each of CLIN 0004AA

2.1.4 Task 5. Provide the following network components:

2 each CLIN 0003AA
11 each CLIN 0003AB
1 each CLIN 0003AC
5 each CLIN 0003AD
3 each CLIN 0003AE
1 each CLIN 0003AF
1 each CLIN 0003AG
2 each CLIN 0003AH
1 each CLIN 0003AJ
50 each CLIN 0003AK
10 each CLIN 0003AL

2.2 Performance Requirements

2.2.1 Equipment/software performance:

The Information Technology Conference (ITC) begins on Monday, August 9, 1999, at 7:00 a.m. and shall continue for fifty (50) hours over five days through Friday, August 13, 1999 and ending at 5:00 p.m. All leased equipment and software shall be operational at a very high level during the hours of the conference. The Contractor shall repair or replace each piece of equipment and/or software and have it operational within 20 minutes of notification (notification will be via voice over walkie/talkie) by VA that a problem has been encountered. Also the equipment/software located at each workstation identified in the Master Floor Plan must not have a cumulative downtime greater than 20% (or 65 minutes) during the fifty hours of the conference. The contractor is responsible for providing whatever spare equipment is necessary to ensure that this level of service is maintained. Each of the workstations that do not comply with these performance requirements shall result in an invoice deduction equivalent to 1/(the number of PCs) or an equivalent percent of the total contract price. Failure of (one of) the file server(s) will result in total failure of the total amount of the PC's; therefore, the cumulative amount of time that the file server is down over the 50-hour conference will result in a deduction from the total contract price. All equipment shall be de-installed and removed from the Austin Convention Center NOT LATER THAN 10:00 p.m. on Friday, August 13, 1999. The contractor

may request removal of PC's from areas where classes have been completed prior to the 5:00 p.m. time. In the event there is no action scheduled for that room or rooms and dis-establishment of these rooms would not take away from the operability of the other portions of the conference, it is possible this request for early removal would be approved.

2.2.2 Contractor Personnel Performance

Contractor must provide adequate number of personnel to complete all services described in this Statement of Work. At least two personnel must be provided on-site during the conference; both shall be expert computer technicians, one of which must also be a LAN expert. These contractor personnel shall be required on-site during the conference beginning August 9, 1999, from 7:00 a.m. to 5:00 p.m. daily and be required to have the ability to be paged during off-hours (one-hour response time). The Contractor must supply a minimum of 4 walkie-talkies for the duration of the conference to be used by the Contractor technicians and LAN expert and by VA personnel. Technicians provided by the Contractor must have specific technical experience with the brand of equipment being furnished, and have experience operating and repairing that specific equipment. Contractor personnel must be able to: (1) install or replace the components of the specific equipment furnished, (2) determine the cause of an operational problem with that equipment, and (3) distinguish between a hardware and a software problem. These Contractor personnel must have telecommunications experience and at least one technician must be a Microsoft NT-ETHERNET LAN expert. The Contractor personnel must be able to troubleshoot data telecommunications problems and must have used and managed telecommunications software packages such as PROCOMM Plus. The Contractor personnel must have used and managed the Microsoft software packages such as "DOS," "Windows 95," "Office," "Windows for Workgroups," "Visual Basic," "Access" and Microsoft NT. Experience requirements must be documented by resumes and provided to VA.

2.3 Deliverables

Deliverable 1. Contractor and VA responsibility. A kick-off meeting will be held in mid-June (date will be agreed by both parties) at which the contractor will provide their plan of accomplishing this task order.

Deliverable 2. VA responsibility. The VA shall provide a fully configured hard drive for replication to all systems (Image Cast, PowerQuest Disk Imaging, or similar) to reach the contractor by COB July 29, 1999.

Deliverable 3. Contractor responsibility. The five (5) server PCs as described in paragraph 2.1.1 shall be delivered to the Austin Automation Center, 1615 Woodward Street, Austin TX 78772 by COB June 9, 1999.

Deliverable 4. Contractor responsibility. Two (2) PCs as described in paragraph 2.1.1 shall be delivered to the Austin Automation Center, 1615 Woodward Street, Austin TX 78772 by (COB) June 9, 1999.

Deliverable 5. Contractor responsibility. Status Reports providing detailed information on the number of PCs gathered and on the completed number of PCs loaded with the VA provided software shall be received after award upon request of the Contracting Officer's Technical Representative (COTR), Mr. Raymond Motloch, or designee.

3 SUPPORTING INFORMATION

3.1 Place of Performance

The equipment/software and contractor personnel will arrive at the Austin Convention Center 500 E. Chavez Street, Austin, Texas 78767 by 4:30 p.m. on Thursday, August 5, 1999.

3.2 Period of Performance

The period of performance begins from the effective date of this task order as signed by the contracting officer and ends upon removal of all equipment from the Austin Convention Center. The actual Information Technology Conference (ITC) will begin on Monday, August 9, 1999 at 7:00 a.m. and continue for 50 hours (5 days) until Friday, August 13, 1999 at 5:00 p.m. The equipment must be completely removed from the Austin Convention Center by August 13, 1999 at 10:00 p.m.

3.3 Special Considerations

- a. If a change must be made in any of the stated specifications, notification and agreement shall be made as early as such new requirements are known.
- b. All PCs must be identical for each instruction room.
- c. Each instructor's PC shall have a Pentium with a 17" monitor.

5 STATEMENT OF OBJECTIVES (SOO) METHOD

5.1 SOO Introduction. The SOO is a Government prepared document incorporated into the solicitation that states the overall solicitation objectives. It can be used in those solicitations where the intent is to provide the maximum flexibility to each offeror to propose an innovative development approach. Offerors use the solicitation, product performance requirements, and SOO as a basis for preparing their proposals, including the SOW. Note: The SOO is not retained as a contract compliance item.

5.1.1 SOO Purpose. The program SOO should provide the basic, top level objectives of the acquisition and is provided in the solicitation in lieu of a Government written SOW. This approach provides potential offerors the flexibility to develop cost effective solutions and the opportunity to propose innovative alternatives meeting the stated objectives. It also presents the Government with an opportunity to assess the offeror's understanding of all aspects of the effort to be performed, by eliminating the 'how to' instructions to accomplish the required effort normally contained in the SOW the Government provides to prospective offerors.

5.2 SOO Content. The Government may include a SOO as part of the solicitation, listed in Section J, attached at the end of the solicitation, or referenced in Section L and/or M, defining the top level program objectives, for non-commercial contracts, or as an attachment to a commercial solicitation (FAR 12). The SOO should address product oriented goals rather than performance requirements. SOOs are normally in the 2-4 page range. The SOO is not a one for one replacement of the SOW. Sections L and M should logically follow with instructions to the offerors asking for proposal information supporting the objectives and evaluation criteria that clearly identify how the offerors' responses will be evaluated. Each portion of the solicitation must support one another. The key is to keep the SOO clear and concise and to provide potential offerors with enough information and detail to structure a sound proposal, designed to be executable and satisfy government objectives. The SOO is used, along with other information and instructions in the solicitation, by offerors, to develop the statement of work. The SOO is replaced at contract award in the contract by the proposed SOW.

5.3 SOO Development Approach. A systematic process is essential for SOO development. The following steps are an integral part of that process:

a. Conduct market research to determine whether commercial items or nondevelopmental items are available to meet program requirements.

b. Review the requirement documents which authorize the program and define its basic objectives. Complete a risk assessment and expound the basic objectives of the program to incorporate the major technical and programmatic risks.

c. Review the various VA requirements documents for program management, acquisition and control impact.

d. Prepare a bibliography citing the specific portions of all applicable governing instructions, directives, specifications and standards with which the program must comply. Keep these requirements to the absolute minimum.

e. For each solicitation/contract defined, prepare a SOO from the objectives identified.

5.4 SOO-SOLICITATION Relationships.

a. Section L: Section L of the solicitation must include instructions to the offeror that require using the SOO to construct and submit a SOW. An example of such wording follows:

"The Statement of Objectives (SOO), included as (cite location of SOO in the solicitation), provides the Government's overall objectives for this solicitation. Offerors shall use the SOO, together with other applicable portions of this solicitation, as the basis for preparing their proposal, including the SOW. The offeror shall ensure all aspects of the SOO are addressed. The SOW should specify in clear, understandable terms the work to be done in developing or producing the goods to be delivered or services to be performed by the contractor. Preparation of an effective SOW requires both an understanding of the goods or services that are needed to satisfy a particular requirement and an ability to define what is required in specific, performance based, quantitative terms. The offerors understanding of both required goods/services, and work effort required to accomplish should be fully demonstrated in the resultant SOW."

b. Section M: Evaluation Factors for Award should include sufficient criteria to:

- (1) Evaluate the offeror's ability to successfully achieve the SOO objectives,
- (2) Ensure a sound approach is proposed, and
- (3) Verify that all requirements can be met.

The Government's intention to evaluate the proposed SOW should be stressed in both Section L and Section M, or in FAR 52.212-2 for commercial solicitations. The offeror's proposed SOW will be evaluated as critical elements in assessing the offerors understanding of both required goods/services, and work effort required to accomplish them.

EXAMPLE SOO

STATEMENT OF OBJECTIVE (SOO)

Software Development – Windows Development for IFCAP

1. **DATE:** October 1, 1999
2. **OBJECTIVE/SCOPE:** Develop IFCAP Functions into a Windows environment for client use, and develop associated interfaces to IFCAP server
3. **TASKS:**
 - a. Develop code for all IFCAP functions for client use in a Windows environment, compatible with any version of Microsoft Windows. The current version is in a Telnet environment for client use.
 - b. Develop appropriate interfaces only from the IFCAP program server to the local area networks where clients use IFCAP.
 - c. Develop user manual for all IFCAP functions in the Windows environment.
4. **PERIOD OF PERFORMANCE:** November 1, 1999 through March 31, 2000
5. **PLACE OF PERFORMANCE:** VA-AAC
6. **AWARD CRITERIA:** The proposal will be reviewed and awarded based on best value to the Government.
7. **DATA RIGHTS:** The Government has unlimited rights to all deliverables developed by the contractor under this order. COTS products and documents are provided with appropriate pass through vendor licenses.
8. **DELIVERABLE(S):**
 - a. Code for task a, January 31, 2000
 - b. Code for task b, March 31, 2000
 - c. Manual, March 31, 2000

APPENDIX A

WORK WORDS/PRODUCT WORDS

B.1 Select the key word that properly expresses the degree of contractor involvement. Specify what is to be done and the total nature of the work requirement. The word list provided in this Appendix is not complete but is provided to stimulate the thinking of the SOW writer by pointing out the critical differences in the meaning of work words versus the product words identified in connection with deliverable data.

B.2 Work words. When selecting the key work word that properly expresses contractor's involvement, the SOW writer must define explicitly the total nature of the work requirement in terms of what is to be done. In some cases, the "why" or the application of the results of the performed work may be stated if it clarifies the requirement. The following sample list contains words which have the inherent value of work. This list is offered as a reminder of the various shades of meaning conveyed by choice of words.

analyze	(solve by analysis)
annotate	(provide with comments)
ascertain	(find out with certainty)
attend	(be present at)
audit	(officially examine)
build	(make by putting together)
calculate	(find out by computation)
consider	(think about, to decide)
construct	(put together; build)
control	(direct; regulate)
contribute	(give along with others)
compare	(find out likeness or differences)
create	(cause to be; make)
determine	(resolve; settle; decide)
differentiate	(make a distinction between)
develop	(bring into being or activity)
define	(make clear; settle the limits)
design	(perform an original act)
evolve	(develop gradually, work out)
examine	(look at closely; test quality of)
explore	(examine for discovery)
extract	(take out; deduce, select)
erect	(put together; set upright)
establish	(set up; settle; prove beyond dispute)
estimate	(approximate an opinion of)
evaluate	(find or fix the value of)
fabricate	(build; manufacture, invent)
form	(give shape to; establish)

APPENDIX A

formulate	(to put together add express)
generate	(produce, cause to be)
identify	(to show or to find)
implement	(to carry out, put into practice)
install	(place; put into position)
inspect	(examine carefully or officially)
institute	(set up; establish, begin)
interpret	(explain the meaning of)
inquire	(ask, make a search of)
integrate	(to add parts to make whole)
investigate	(search into; examine closely)
judge	(decide; form an estimate of)
make	(cause to come into being)
maintain	(to keep in an existing state, to continue in, carry on)
manufacture	(fabricate from raw materials)
modify	(to change, alter)
monitor	(to watch or observe)
notice	(comment upon, review)
observe	(inspect, watch)
originate	(initiate, to give rise to)
organize	(integrate, arrange in a coherent unit)
perform	(do, carry out, accomplish)
plan	(devise a scheme for doing, making, arranging activities to achieve objectives)
probe	(investigate thoroughly)
produce	(give birth or rise to)
pursue	(seek, obtain or accomplish)
reason	(think, influence another's actions)
resolve	(reduce by analysis, clear up)
record	(set down in writing or act of electronic reproduction of communications)
recommend	(advise, attract favor of)
review	(inspection, examination or evaluation)
revise	(to correct, improve)
study	(careful examination or analysis)
seek	(try to discover; make an attempt)
search	(examine to find something)
scan	(look through hastily, examine intently)
screen	(to separate, present, or shield)
solve	(find an answer)
test	(evaluate, examine)
trace	(to copy or find by searching)
track	(observe or plot the path of)
update	(modernize, make current)

APPENDIX A

B.3 PRODUCT WORD LIST. Although Non-personal Services contracts may not result in data as a deliverable product, a large portion do. This list of product words is provided to assist in identifying those products.

agenda	logs
audio visual aids	manuals
books	manuscript
cards	materials
certificates	minutes
charts	outlines
decks	proposals
disc-magnetic	pamphlets
documentation	plans
drafts	procedures
drawings	publications
drums-magnetic	recommendations
equipment	records
files	recordings
findings	reproducible
forms	reports
guides	requests
graphics	sheets
handbooks	specifications
illustrations	standards
lists	systems
ledgers	tapes
	transparencies

APPENDIX B

PHRASES HAVING MULTIPLE MEANINGS

C.1 This list of phrases having multiple meanings is provided as an example of those to be avoided.

To the satisfaction of the contracting officer,

As determined by the contracting officer,

In accordance with instructions of the contracting officer,

As directed by the contracting officer,

In the opinion of the contracting officer,

In the judgment of the contracting officer,

Unless otherwise directed by the contracting officer,

To furnish if requested by the contracting officer,

All reasonable requests of the contracting officer shall be complied with,

Photographs shall be taken when and where directed by the contracting officer.

In strict accordance with,

In accordance with best commercial practice,

In accordance with best modern standard practice,

In accordance with the best engineering practice,

Workmanship shall be of the highest quality,

Workmanship shall be of the highest grade,

Accurate workmanship,

Securely mounted,

Installed in a neat and workmanlike manner,

APPENDIX B

Skillfully fitted,

Properly connected,

Properly assembled,

Good working order,

Good materials,

In accordance with applicable published specifications,

Products of a recognized reputable manufacturer,

Tests will be made unless waived,

Materials shall be of the highest grade, free from defects or imperfections, and of grades approved by the contracting officer.

Kinks and bends may be cause for rejection,

Carefully performed,

Neatly finished,

Metal parts shall be cleaned before painting,

Suitably housed,

Smooth surfaces,

Pleasing lines,

Of an approved type,

Of standard type,

Any phrases referring to "The Government inspector".