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With the power of automated reminders and live conversations, keep your customers engaged and informed about any roadblocks, task statuses, or project updates. Stay ahead of the game by capturing real-time customer feedback with automated CSAT surveys throughout the project lifecycle. With Rocketlane integrations, you can connect the end-to-end of project delivery from project creation to hand-off. Explore our integrations Deliver projects on time and on budget. Collaborate with your team, partners, and customers. Without scope creep, stress, or missed goals. More and more businesses are turning to contingent workers to gain better access to quality talent and realize the many strategic benefits. If you are too, we can help manage your costs, mitigate your risks and use technology to get the most out of your flexible workforce! HCMWorks provides the expertise, the technology and processes to help you reduce your workforce costs, mitigate against misclassification and co-employment risks, and optimize your contingent workforce program. Whether you manage your workforce programs in-house or are looking for an outsourced solution, HCMWorks can support you in key areas to give you an extra hand, and share best practices. We are pleased to also share our expertise and industry insights in the HCMWorks Blog. We hope you take a moment to subscribe and share our content with your colleagues. Several service providers and their customers across the globe are collaborating and working together on various projects in an ever-changing business environment. The number of such collaborations is on the rise and is only expected to grow further. While working with external organizations can open up many opportunities, it comes with its challenges. The most common issue in collaborative projects is miscommunication between the parties involved, which can potentially derail the project. Even if you have a strong rapport with your client, wouldn't it be better for everyone involved to get a clear understanding of expectations before beginning work? In fact, it could further enhance your relationship. So how do you set these expectations and communicate them so all of you are on the same page? The answer is simple - create and share a Statement of Work (SOW). Here is a complete guide on how to write a statement of work. What is a Statement of Work? A Statement of Work or SOW is a detailed, comprehensive, legally binding document that clearly defines the different aspects of a project. It chalks out all the details of various aspects of work agreed upon by you and your client. Not only does it help build trust with the client, but it can also save you a lot of trouble as you progress through the project lifecycle. An SOW is typically created during the kickoff phase and describes the deliverables, tasks, timelines, budget, success criteria, and other information related to the project in great detail. It is one of the most critical documents in project management because it becomes a reference that both the client and the project teams can use to determine the project's scope. Purpose of a Statement of Work Being an integral part of the contract but is not a contract in itself. It is sent to the client for approval and is flexible to change. 2. Statement of Work and Project Charter Both these documents are created during the initial phase of the project but have different purposes. A project charter is a brief document that summarizes and highlights all the critical information regarding the project. Approving a project charter formalizes the project and authorizes the project manager to use project resources to achieve its objectives. A statement of work, on the other hand, does not formalize or initiate a project. It is a legally binding document that defines all the work that has been agreed upon by the two parties. 3. Statement of Work and Scope of Work The terms statement of work and scope of work are often used interchangeably. However, their meanings can vary depending on the context. For example, the scope of work is only an element in the overall statement of work and defines the extent of the work that will be done as part of the project. On the other hand, a Statement is a detailed agreement of each aspect of the work that needs to be done such as timelines, budget, resources, etc. Components of a Statement of Work Now that we have understood what a statement of work is and its importance, let's look at the main components included in a comprehensive statement of work document. 1. Purpose This is the first section of your statement of work document. Start by briefly explaining the project, its objectives, and expected outcomes. It must also answer critical questions such as why the project is being initiated, the issues being addressed, and how both parties will benefit. Make sure that this section is simple, straightforward, and very easy to understand for everyone involved. It should provide an overview as all this information will be covered in greater depth in other document sections. 2. Scope This section should contain information regarding all the work that will be done and the extent of the work that will be covered. Therefore, its good to divide this section into two parts: scope and scope. The in-scope section will include all the dimensions of work covered by the project team, while the out-of-scope section will specify all the aspects that will not be covered. You can also add information on the types of hardware, software, and people resources you will use. For example, if the project is to design a website, the scope of work will include steps such as develop new website mock-ups, create design elements, work with client personnel in a joint project team during the launch phase and so on. If you and your team will not be working on any particular element such as website promotions, but that under the out-of-scope section. It must include any kind of work that you will not be performing. 3. Deliverables and milestones Deliverables refer to what the client will finally receive. In large and complex projects that go on for a long time, these deliverables are put down as small events or milestones to measure progress. This section will include target start and end dates so that the project team has a basic timeline to plan the work that needs to get done. Make sure to keep a little buffer time between each milestone so that there aren't significant deviations from the overall project timeline in the event of slight delays. For example, design website landing page can be a milestone with a target start and end date. You could keep a gap of a few days before listing the next milestone target dates. 4. Task list A task list is a detailed list of specific tasks with their own start and end dates that need to be done to complete each deliverable. It essentially breaks down each deliverable into smaller tasks for efficient task management. Each task must be specific and explain the action that needs to be taken clearly. These tasks can be divided based on milestones or particular phases like a launch, kickoff, design, etc. For example, if design website landing page is a deliverable under the design phase, wireframing will be listed as one of the tasks that need to be done to complete the deliverable. 5. Testing and resources Testing is a field that is especially relevant in software projects where different elements and deliverables will have to be tested and evaluated before handing it over to the client. List down the elements that will be tested along with the resource who will be performing the testing. This will provide clarity on what exactly needs to be tested and by who. Its also more convenient for stakeholders to refer to the document and identify who to reach out to and for what. 6. Success criteria This is a very important field in the statement of work document. It mentions the specific standards that need to be met for the deliverables to be considered complete. It defines what success looks like to you and your client when the project is delivered. Specifying this in your document will provide both you and your client clarity on what standards are expected to be met. 7. Payment schedule This section includes all information regarding the project budget and payments. Specify the different fields or particulars that will be charged and when they will be charged, along with the amount. This way, you'll know when to expect payments and for what while ensuring that everyone stays within the agreed budget. 8. Terms and requirements This is the final section of your statement of work before it is approved and signed off. It includes all the additional essential details that have been agreed upon but do not fall under the sections mentioned above. Information such as place of work, security requirements, certifications, etc., can be listed under this section. 9. Approval and signoff This is the last section of your statement of work document. Once all the document details are negotiated and agreed upon, the document will be sent to the client for final approval and sign-off. This finalizes the agreement and seals the deal between the two parties. Free Download: Statement of Work Template Best Practices! Make it detailed! The statement of work needs to be as detailed as possible. Dont make assumptions about any dimension of work that needs to get done. Instead, everything that needs to be completed should be explicitly mentioned in your statement of work, right from tasks and timelines to resources and specific requirements. 2. Keep it specific and measurable! While writing your statement of work, make sure that every detail mentioned is specific and can be objectively measured. Hence, its always a good idea to mention specific numbers that you wish to target, both realistic and achievable. 3. Make it visually easier on the eyes to have information presented in tables and charts instead of big, wordy paragraphs. It is also more convenient to identify key details and refer to the document when each section is clearly defined. 4. Define and explain terminology! If your document includes complex terminology that not everyone may know, you could include a small glossary section that defines these terms. Besides this, make sure that everything mentioned in your document is crystal clear and easy to understand. 5. Establish timelines as estimates! Make sure that all the dates and timelines mentioned in your document are only estimates. This will ensure a little bit of time between each task and milestone in case any adjustments or time are required for review. This way, the project will stay within the estimated timeframe and will not deviate completely. 6. Define pricing and budget! Clearly defining and agreeing on the budget and pricing will eliminate confusion or delays in payment. It will also give the team an idea about the budget within which work needs to be done. 7. Send the SOW for legal review! Before sending your document to the client for approval, make sure to have it reviewed by your legal team. This will ensure that all the information that needs to be on the document is present, precise, and correct from a legal point of view before approval and sign-off. Mistakes to avoid! 1. Rushing the document creation process! Plan the statement of work document. Although this document needs to be made during the initial stages of the project, do not rush it and write one too early before all the project details are discussed and chalked out. Instead, you can make notes at each discussion meeting and then create the final document. 2. Fluffy and generic terms! Make sure not to use general and unspecific terms such as lots, many, high, and other such words while writing your document. This can leave scope for assumptions, leading to confusion and the inability to measure success objectively. Avoid Making any section too wordy and keep it to the point. 3. Being too rigid! A statement of work is typically discussed and negotiated with the client before it is finalized. Therefore, make sure that your document is not too rigid and can accommodate timelines, resources, or budget changes. 4. Irrelevant templates! While templates can save you a lot of time and effort in planning and writing your statement of work, make sure that you use one that fits your business requirements and includes all the essential fields that need to be covered. 5. Starting the project without a signed SOW! A signed and agreed statement of work seals the deal between you and your client. It finalizes all the details of the statement of work. Hence, it is best to ensure that the SOW is signed before you begin any work for the project. Statement of Work template! To conclude, you can use this guide to write an effective statement of work for any type of project, whether it is software or real estate. The essence of the document remains the same across businesses. So, make sure to follow these tips while writing yours, and you'll have a solid SOW document to work with. If you'd like to hit the ground running, download this free template and customize it according to your requirements. More resources Services publics et Approvisionnement Canada Public Services and Procurement Canada Share copy and redistribute the material in any medium or format for any purpose, even commercially. Adapt remix, transform, and build upon the material for any purpose, even commercially. The licensor cannot revoke these freedoms as long as you follow the license terms. Attribution You must give appropriate credit, provide a link to the license, and indicate if changes were made. You may do so in any reasonable manner, but not in any way that suggests the licensor endorses you or your use. Share Alike If you remix, transform, or build upon the material, you must distribute your contributions under the same license as the original. No additional restrictions You may not apply legal terms or technological measures that legally restrict others from doing anything the license permits. You do not have to comply with the license for elements of the material in the public domain or where your use is permitted by an applicable exception or limitation. No warranties are given. The license may not give you all of the permissions necessary for your intended use. For example, other rights such as publicity, privacy, or moral rights may limit how you use the material. MIL-HDBK-245D, DEPARTMENT OF DEFENSE HANDBOOK: PREPARATION OF STATEMENT OF WORK (SOW) (03 APR 1996)., This handbook provides guidance to enable personnel to create a completed contract Statement of Work (SOW) applicable to any material acquisition life-cycle phase. It also covers the SOW preparation for non-personal services contracts. When it comes to drafting contracts for contingent workers, you have to get it right the first time around. Any unidentified conditions or ill-described product specifications can lead to unmet quality standards by contractors and potential liability as a result of inadequate instruction. Every step of the managed service life-cycle involves paperwork to prevent this, and selecting the right statement of work (SOW) for the right service provided is vital. Once the type of SOW is identified, automation can streamline and expedite paperwork processes. Including automated SOWs in your workforce management process ensures compliance, reduces human error, and establishes consistency. Streamlining the process through automation solutions can help free up valuable time and give you peace of mind knowing that all critical aspects are covered by the agreement. This article discusses three types of SOWs and how to save time by automating them. The Three Types of SOWs SOWs are project-based agreements that may include the actual scope of work, project description and objectives, materials provided (if any), timeline/project completion dates, fee for service, required experience, deliverables, performance specifications, evaluation factors, and more. While the differences between the agreement types are minimal, selecting one of the three types can provide clarity as to what the job entails and how to accomplish the objective. The preferred type will depend on the industry and task performed. Design & Detail SOW This type of agreement is frequently used in the government, construction, and manufacturing. A design/detail SOW is constructed to do just that - provide a detailed description of how the project is to be accomplished. The government entity, or individual/company requiring services, clearly defines how the work is to be done and what is required to do so. If an individual is contracted to perform a task, the SOW will precisely outline what materials to use, required dimensions, assembly instructions, and project deadlines. Because the contractor is instructed to follow detailed guidelines for operation, the buyer, client, or entity bears most of the risk. Design/detail SOW automation would allow hiring and procurement teams to auto-populate fields, reducing the time taken to fill in tedious information and form a detailed, thorough document. Level of Effort SOW Level of Effort SOW, also known as a time and materials/unit rate statement of work, outlines the hourly service fee and materials required to perform a task. Because of its flexible guidelines and general task description, it is well-suited for short-term or temporary contracts. Contracted individuals are required to accomplish an objective and are compensated by the hour or by the unit to do so, incentivizing timely and efficient service. Automating a level of effort statement of work is especially efficient because the majority of the required information is standardized. In turn, minimal project-specific information needs to be added to the premade document, and less time spent forming a detailed agreement for a short-term project. Performance-Based SOW This is a common type of SOW utilized by American and Canadian businesses in both the public and private sectors. Performance-based SOWs are aptly named as they focus on performance rather than how the service is completed. These SOWs detail the projects purpose, resources, results expected, and quality. While a detail SOW specifies how a project is to be completed, performance-based SOWs focus on what is completed. For example, an individual will be required to perform a quantifiable task, such as providing X amount of deliverables without being told how. The defined lack of micromanagement places liability on the contractor as the objective is accomplished by their own means. By automating performance-based SOWs, producing an agreement becomes streamlined. The user simply enters names, quantifiable KPIs, and other fields rather than drafting an entire document from scratch. How to Automate SOWs Automating SOWs assists HR and procurement teams in several ways: Establishes consistency/Reduces time taken to write out an entire contract/Ensures accurate and compliant structure/Lowers service procurement workload/Reduces human error associated with manual entry/Statement of work automation can be accomplished in a number of ways depending on the type of SOW necessary. Some companies utilize content libraries, templates, drop-down tabs, and select formatting with minor manual entries. While some information is standardized, other required fields can be filled with project-specific information via automation, manual entry, or limited selection options. In addition, there are different software solutions that are purpose-built for SOW automation. Investing in a software solution can be especially helpful for companies that frequently hire contingent workers for limited projects. Implementing Statement of Work Automation Engaging with a managed service provider (MSP) who specializes in SOW strategy for contingent workforces can simplify human capital management. HCMWorks has extensive experience helping HR and procurement teams in the public and private sectors streamline their processes. To learn more about how we can help you build the right SOW management strategy, contact our team of workforce experts. The Statement of Work (SOW) is a document that enables the offeror to clearly understand the governments needs for the work to be done in developing or producing the goods or services to be delivered by a contractor. It defines (either directly or by reference to other documents) all work (non-specification) performance requirements for a contractor. It also facilitates the preparation of a proposal and aids the Government in conducting the source selection and contract administration after award. Definition: The Statement of Work (SOW) defines (either directly or by reference to other documents) all (non-specification) performance requirements for contractor effort. The SOW should specify in clear, understandable terms the work to be done in developing the goods or services to be provided by a contractor. (MIL-HDBK-245) Whether the SOW is written by the government or the contractor (or some combination of both), it is a key element of a contract. After the contract award, requirements in the SOW (and associated specifications) constitute the standard and discipline for the contractors effort. It comprises the baseline against which progress and subsequent contractual changes are measured. Both the Government and the contractor look to the SOW as a key document defining the responsibilities of both parties. Types of Statement of Work (SOW) There are two types of statements of work that are used by the government and industry. These two types are: Statement of Work (SOW): For system procurement and Research and Development (R&D) (MIL-HDBK-245) Performance Work Statement (PWS): For the acquisition of professional services. (AFI 63-124) What is a Performance Work Statement (PWS)? A Performance Work Statement (PWS) is an SOW for performance-based acquisitions that clearly describes the contractors expected performance objectives and standards. Preparation of the Statement of Work (SOW) Preparing an effective SOW requires an understanding of the goods or services needed to satisfy a particular requirement and an ability to define what is required in specific, performance-based, quantitative terms. The SOW should reference qualitative and quantitative design and performance requirements contained in specifications developed according to MIL-STD-961. [1] A Well-Written Statement of Work (SOW) has the following attributes: [1] Specifies requirements clearly to permit the government and offeror to estimate the probable cost and the offeror to determine the levels of expertise, manpower, and other resources needed to accomplish the task. States the specific duties of the contractor in such a way that the contractor knows what is required and can complete all tasks to the satisfaction of the contract administration office. Written so specifically that there is no question of whether the contractor is obligated to perform specific tasks. References only the absolute minimum applicable specifications and standards needed. Selectively invokes documents only to the extent required to satisfy the existing requirements. Separates general information from the direction so that background information and suggested procedures are clearly distinguishable from contractor responsibilities. Avoids directing how tasks are to be performed and states only what results are required. 8 Steps to Developing the Statement of Work (SOW) Content There are as many parts in a Statement of Work that need to be developed, but first, focus on defining the key topics. Once you have the key topics defined the others will be a lot easier to develop. Step 1: Write the Introduction: Explain what work needs to be accomplished and who is involved. This forms the baseline for the entire project and helps potential offers understand and set their prices and capabilities. Step 2: Determine the Project Purpose: Answer the question of why we are doing this. To do this establish a purpose statement and answer the basic questions of what are the goals, deliverables, and objectives. Step 3: Develop the Scope of Work: Determine the process that will be used to complete the work, including what hardware and software will be necessary. The scope should include time, results, and general steps for accomplishment. Keep the scope broad enough to give you the flexibility to make future revisions via the Changes clause. Step 4: Determine Work Location: Choose all locations where project members might and will have to perform all tasks in the SOW. Step 5: Develop the Tasks: Break the project down into more detailed tasks to include all the main deliverables, milestones, phases, and key tasks (Be specific) A Work Breakdown Structure (WBS) is a good tool to use during this step. Step 6: Determine the Milestones: Develop the projects proposed start and finish date and all the major milestones in between. Use when products and tasks are scheduled to be completed. Step 7: Determine the Deliverables: List each deliverable, show when it is due, and describe them in detail. Provide as much detail in this step. Step 8: Develop the Schedule: Start with all the steps/tasks the project needs to accomplish, then create a realistic schedule around those steps. The steps should include each major deliverable and when and in what order it needs to be done. Then, add all the management-related milestones, including kickoff, reviews, development, implementation, testing, and project closure/acceptance. To create the actual Statement of Work, it is best to use an established template from your organization or from a legal entity. Since you already have the task and the content defined, it should be an easy step to plug in your content. A template also ensures you address all legal questions and dont miss any content. Template: Performance Work Statement Template: Generic Performance Work Statement Template Statement of Work (SOW) Notional Format: Scope: This section includes a brief statement of what the SOW should cover. The scope paragraph defines the breadth and limitations of the work to be done. Period of Performance Assumptions Deliverable Milestones Governance (Approval Authority) Applicable Documents: Military handbooks, government instructions, service regulations, technical orders, and policy letters, as a type, are not written in language suitable for contract application. Requirements: Specific work tasks developed to satisfy program needs are essentially the contractor work requirements. General Requirements/Technical Objectives and Goals Specific Requirements Using a Work Breakdown Structure to Develop the Statement of Work (SOW) A Work Breakdown Structure (WBS) should be used in developing the SOW. A WBS provides the framework for a disciplined approach to structuring and defining the total project or program. When preparing the SOW, a complete application of a WBS may not be necessary for all programs. However, the underlying philosophy and structured approach can and should be applied. The Contract Line Item Number (CLIN) and the SOW should be constructed to correlate with the WBS. Using a WBS during SOW development facilitates a logical arrangement of the SOW elements and provides a convenient checklist to trace all necessary program elements and ensure that they are addressed in the SOW. [1] Statement of Work (SOW) Data Requirements Each SOW will most likely have data requirements that the government and contractor need. Below is a list of key data topics that you should consider: Deliverable data is governed by Data Item Descriptions (DIDs) in the Contract Data Requirements List (CDRL), which establish the format and content requirements. SOW taskings must not include the description and delivery requirements for data. DoD 5010.12-M Procedures for Acquisition and Management of Technical Data governs contracting for data. The SOW tasks the contractor to perform effort; deliverable data is the by-product. Each deliverable data item must link to tasking in the SOW, which generates the effort that results in the delivery of data. The SOW tasking paragraph resulting in data delivery must cite either the CDRL Sequence No. or the applicable DID, or both, at the end of the tasking paragraph. AcqNotes Tutorial Statement of Work (SOW) Checklist Is the SOW consistent with all sections of the Request for Proposal (RFP)? Is the SOW organized under the following major headings? SCOPE APPLICABLE DOCUMENTS REQUIREMENTS Is the SCOPE section free of everything that could be interpreted as: Directions to the contractor to perform work tasks, Specification of data requirements, and Description of deliverable products? Do documents listed in Section 2 have the specific version listed, along with other publication facts such as document numbers and dates where applicable? Are all of the documents listed in section 2 actually cited? When documents are cited, are only the specific sections necessary to do the work cited? Is the document clear and complete enough for the contractor to estimate the probable cost and identify all resources needed to do the work? Is there no question as to whether the contractor has been told what specific tasks to perform? Are the binding requirements clearly distinguishable from the background information? Is the SOW free of how to requirements? Is the SOW free of statements that order or describe data items? Is the SOW free of references to Data Item Descriptions (DID)? Is the SOW free of proposal requirements and evaluation factors? Is the SOW free of business management matters that belong in the other contract sections, like requirements for time of performance? Is the SOW free of specifications and amendments to specifications for equipment, parts, materials or other goods? Is the SOW free of references to Government in-house management instructions? Is the SOW free of requirements that cite Government specifications or standards? Is the SOW free of requirements that cite handbooks, service regulations, technical orders, or any other Government document not specifically written according to DoD standards? Does the title page contain the title, preparation date, procurement request number or contract number, revision number, date, and identity of the preparing organization? If the document exceeds five pages, does it have a table of contents? If so, is the table correct? Does the SOW require the delivery of a product or result other than just periodic progress reports? Does each paragraph cover only one requirement? Does each paragraph and subparagraph have a title? Is the SOW free of pronouns with ambiguous antecedents? Is the terminology consistent throughout the entire package? Have you double-checked all of the shalls and wills? Are you sure there are no anys and ors that could be interpreted differently from what you might like? Example of Statement of Work (SOW) Tasks The following is a short list of SOW tasks for a software project. For a more detailed list, visit Example Statement of Work. The contractor shall establish the Computer Software & Support (CS&S) architecture within the context of the overall system including a selection of processor types and architecture, and software architecture and major interfaces, in accordance with applicable Open Systems guidance. As applicable, the SOW should describe which architecture evaluation steps are the suppliers responsibilities and which are to be performed jointly by the acquirer and the system supplier. The contractor shall generate a specification, SOW, Work Breakdown Structure (WBS) in accordance with the Contract Data Requirements List (CDRL), Integrated Master Plan (IMP), Integrated Master Schedule (IMS), and Software Development Plan (SDP) sufficient to describe the software development processes to be employed on the program. The contractor shall design, fabricate, integrate, test, and evaluate the hardware, software, facilities, personnel subsystems, training, and the principle items necessary to satisfy program requirements and to support and operate the system. This includes the requirements analysis, design, coding, and unit testing, component integration and testing, and Computer Software Configuration Item (CSCI) level testing for software. This also includes system development and Operational Test and Evaluation (OT&E), software quality, Configuration Management, and support for the software. The contractor shall define a Software Development Approach appropriate for the computer software development and integration effort to be performed under this solicitation. The contractor shall document the software development approach in an SDP, shall implement the SDP requirements, and shall maintain the SDP. The contractor shall use Earn-Value Management (EVM) to manage, determine the status of, and report on the software development effort. The contractor shall implement selected Software Metrics to provide management visibility into the software development process and progress. The contractor shall apply core software metrics as a minimum. The selected metrics shall clearly portray variances between actual and planned performance, shall provide early detection or prediction of situations that require management attention, and shall support the assessment of the impact of proposed changes on the program. The contractor shall provide the program office with routine insight into these metrics. Statement of Work (SOW) Funding The SOWs should be consistent with the proposed appropriation to be charged from a Purpose-Time-Amount standpoint. Specifically, the funds being cited on the SOW should be used for the proper purpose, within the legal timeframes established by Congress, and within the amounts authorized, appropriated, and allocated to the program. Statement of Work (SOW) in the Request for Proposal (RFP) The SOW is shown in its entirety in Request for Proposal (RFP) Section C of the uniform contract format or incorporated by reference, then listed in and attached to Section I, Statement of Work (SOW) vs. Statement of Objective (SOO) The SOO is a Government prepared document that provides the basic, high-level objectives of the acquisition. It is provided in the solicitation in lieu of a government-written Performance Work Statement. In this approach, the contractors proposals contain their statements of work and performance metrics and measures (which are based on their proposed solutions). The use of an SOO opens the acquisition up to a wider range of potential solutions. Conclusion The statement of Work is one of the most important documents on a defense acquisition program. The document enables the offeror to clearly understand the governments needs for the work to be done in developing or producing the goods or services to be delivered by a contractor. Without an SOW there might be confusion about what is required from both the contractor and the Government. Take your time and develop the best SOW you can, it will save you a lot of time in the future if anything was to go wrong. AcqTips: AcqLinks and References: Updated: 2/9/2024 Rank: 627

Dod statement of work example. Statement of work example. What is included in a statement of work. What is a statement of work. What should a statement of work include.