

## Generic Statement of Work (SOW) Template

The statement of work (SOW) format is meant to be a guide and is not necessarily all-inclusive; as such, contents should be tailored to the requirement. Consult your BIA contracting officer for further guidance.

The program office will need to prepare a SOW, for instance, when acquiring a service but not relying on the contractor's commercial description to define the requirement. In this situation, purchasers are tailoring the commercial services performed by the contractor (e.g., program management services) to meet a particular government need (e.g., management of a process improvement program).

### SOW Format

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### Background

Identified as the Introduction, this section provides information needed to acquaint the reader with the basic acquisition situation. The background information may:

- Define the program mission;
- Identify the requirement in very general terms;
- Describe why the project is being pursued and how it relates to other projects;
- Summarize any statutory authority or regulations affecting the overall requirement; and
- Identify any background materials attached to the SOW.

### Objectives

This section should provide a concise overview of:

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

### Scope

Provide a brief statement of what the government expects to accomplish under the contract-the breadth and limitations of the contract effort. It should not include specific work tasks or a description of deliverable products.

For example:

The government has a need for non-personal information technology project management services in the Southwest Regional Office. The contractor shall not perform inherently governmental functions under this contract but shall manage the relocation of 700 IT items to one central location. The contractor shall coordinate the relocation with the relocation product owners in 8 offices (items are defined in appendix A; offices and points of contact are defined in appendix B).

A second example:

The government has a need for non- personal services training on economic development in Native American communities. The contractor shall provide training to approximately 30 personnel at BIA office space (defined in place of performance).

### Tasks

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

- For a **performance-based work statement**, this section should describe requirements in terms of results required rather than the methods for completing the work. This latitude will permit the contractor to develop new and innovative ways to complete those tasks.

Performance-based work statements are the standard for commercial items when we are acquiring supplies or services based on definite performance (move furniture from point A to point B) or design requirements (Smartphone).

- For a **level of effort statement of work**, this section should identify all tasks that must be performed and the hours to be devoted to each task.

Level of effort work statements are used in times like repair, engineering, call center, help desk, etc. when it is not possible for the government to determine the extent or duration of the work.

- For a **detailed statement of work**, this section should describe how the service must be accomplished. It may include precise measurements, tolerances, materials, quality control requirements, and other government requirements that control the processes of the contractor.

Detailed work statements may be appropriate when the government requires specifications and standards, security requirements, and approved curriculums.

This section must describe requirements in a way that permits contractor personnel to perform the service without direct government supervision. Contractor personnel must not be subject to the type of supervision and control usually prevailing between the government and its employees, also known as personal services. For example, a SOW may permit the government to approve key personnel, but must not permit the government to approve all personnel performing the service. The SOW should also not include words (e.g., “use methods directed by the **contracting officer’s representative (COR)**”) that appear to indicate that the government is managing day-to-day operations. Other items to consider:

- Specify requirements clearly so that all readers can understand them.

- Reference only the absolute minimum applicable specifications and standards needed.
- Tailor specifications and other documents.
- Separate general information from direction.

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Task Example

3.1 Task Areas

Include specific titles of all tasks for required performance.

Task 4.1 Title as applicable

Task 4.2 Title as applicable

Task 4.3 Title as applicable

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

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

**4.1 Task 1 - Title**

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

**4.2 Task 2 - Title**

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

**4.3 Task 3 - Title**

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

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**Delivery**

If contractors are onsite or deliver a product, a statement similar to the example below shall be included:

Example:

**Contractor Identification:** When performing as contractor, the contractor shall identify themselves as contractors for the government both orally and in writing. In addition, all materials produced under contract must be labeled sufficiently to identify it as contractor produced materials. Under no circumstances shall the contractor state or imply that it is acting on behalf of the government.

This section should clearly state:

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

Example Deliverable Schedule

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

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

This section should identify any government-furnished property provided to the contractor. This includes all government-furnished property, such as government-furnished material, equipment, or information. If the list of property is extensive, this section should identify where that list can be found. Before offering to provide any property, make sure that it will be available when required, where required, and in the condition required by the contract. Failure to meet government-furnished property requirements often lead to a contractor claim for an equitable adjustment to contract price, delivery, or other requirements. See FAR 45 and DOI policy for specific requirements about providing government-furnished property.

**Security**

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

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

**Travel**

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

**Special Material Requirements**

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

**Other Unique Requirements**

Discuss any other unique requirements or considerations.

**Place of Performance**

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

**Period of Performance**

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

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*SOW Language Tips:*

A variety of people with different perspectives and life experiences will read your SOW. Readers typically include government and industry contracting personnel, managers, technical experts, accountants and lawyers. All these readers need to understand the SOW in a clear and concise manner; therefore, language selection is very important.

Below are tips that you should consider when reviewing the SOW:

- Use simple words, phrases, and sentences whenever practical.
- Be concise, precise, and consistent. Keep sentences short and to the point. Normally the longer the sentence, the harder it is to understand.
- Use verbs in the active voice. A verb is in the active voice when it expresses an action performed by its subject. For example, "The contractor shall report contract progress quarterly." Conversely, avoid using verbs in the passive voice. A verb is in the passive voice when it expresses an action performed upon its subject or when the subject is the result of the action. For example, "Contract progress shall be reported quarterly by the contractor."
- Use "shall" or "must" when writing a requirement binding on the contractor. Avoid "should" or "may" because they leave the decision on appropriate action up to the contractor.
- Use "will" to indicate actions by the Government.
- Be consistent when using terminology. Use the same word to mean the same thing throughout your SOW. Avoid using different words to indicate the same type of action.
- Avoid redundancy. At best, requiring the contractor to do the same thing in different parts of the SOW will add needless words to the SOW. At worst, there may be subtle differences in the requirements that may lead to a dispute during contract performance.
- Avoid vague or inexact phrases and generalizations.

- Avoid catchall and open-ended phrases, such as, “is common practice in the industry,” “as directed,” or “subject to approval.” If you want to give the vendor an opportunity to use their standard commercial practices, require each quoter to identify its commercial practices in a proposal and then include that proposal as part of the order or contract.
- Define technical terms.
- Avoid using government jargon. Assure that it is clearly defined whenever jargon must be used.
- Only use “any,” “either,” “and/or,” “etc.” when allowing the contractor to select an alternative.
- Use abbreviations or acronyms only after spelling them out the first time they are used. Spell them out even if they are commonly used by BIA because a commercial contractor may not be familiar with them.
- Identify the date or version of any document referenced in your SOW.
- Advise readers from industry where they can obtain referenced documents.