#### PERFORMANCE WORK STATEMENT (PWS) TEMPLATE

This section presents two (2) PWS template formats: A. Basic Framework and B. Detailed Framework. The Basic Framework is designed for use in less complex acquisitions while the Detailed Framework is designed for use in complex acquisitions.

#### A. Basic Framework

- 1. <u>Scope</u>. This section includes a brief statement of what the PWS should cover. The scope paragraph defines the breadth and limitations of the work to be done. In some cases, the use of an introduction, background, or both, is preferred. Separate indentures under this Section are used in PWS to accommodate complex acquisitions requiring lengthy background information. Background information should be limited to only that information needed to acquaint the proposer with the basic acquisition requirement. The items listed below should not be included in the Scope Section.
  - a. Directions to the contractor to perform work tasks.
  - b. Specification of data requirements.
  - c. Description of deliverable products.
- 2. <u>Applicable Documents</u>. Government handbooks, government instructions, department regulations, technical orders, and policy letters, as a type, are not written in language suitable for contract application. In the event requirements of these documents must be included in a PWS, excerpts only should be used and should be made into either a clear task statement or a clear reference statement for guidance only, and not for contract compliance. Any documents identified in this section of the PWS should have the specific version referenced, i.e. by date or by revision letter.
- 3. Performance Requirements/<u>Tasks</u>. Specific work tasks are called for in this section of the PWS.
- 4. <u>Contractor Quality Assurance</u>. This section specifies requirements for the contractor's inspection system. It specifies particular inspections and tests which the contractor must perform. It specifies particular inspection records which the contractor must maintain. The inspection of services clause in a government service contract requires that the contractor maintain an inspection system that is acceptable to the to the government. If the buyer has particular requirements for the contractor's inspection system, this section is the place to specify them

#### *Note:*

- 1. There is no specified format.
- 2. Describe the work in terms of the required results rather than either how the work is to be accomplished or the number of hours to be provided.
- 3. Enable assessment of work performance against measurable performance standards.

- 4. Rely on the use of measurable performance standards and financial incentive in a competitive environment to encourage competitors to develop and institute innovative and cost effective methods of performing the work.
- 5. The Contractor's Quality Assurance Plan is <u>NOT</u> the Quality Assurance Surveillance Plan (QASP).

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## **B.** Detailed Framework

Introduction

## **NOAA Checklist for the PWS Writer**

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Introduction
1. Does the introduction provide a quick reference to what you are procuring?
YesNo
Remarks:
2. Is the introductory information readily distinguishable from the background and scope
sections?
YesNo
Remarks:
3. Have work requirement or information contained in other sections of the performance
work statement removed?
YesNo
Remarks:

## **NOAA Customer Contact Information**

4.	Have the Contracting Officer Representative (COR), Alternate Contracting Officer Representative (ACOR), Task Monitor been identified and included in the PWS? YesNo  Remarks:
5.	Has Point of Contact information, such as name, address, phone number, fax number, and email been provided for the identified COR, ACOR, and Task Monitor? YesNo
	Remarks:
Perio	od of Performance
6.	Has the Task period of performance been stated in terms of a "from" date and "to" date? YesNo
	Remarks:
7.	Does the task period of performance reference the contract period of performance? YesNo
	Remarks:
Place	e of Performance
8.	Does the PWS state whether the work must be accomplished on a Government site or whether the work may be accomplished at a contractor facility? YesNo
	Remarks:
9.	Have all required locations of performance been specified? YesNo
	Remarks:

# Background

current requirement? That is, will the offeror understand how and/or why the requirement evolved and where this requirement is headed, if appropriate? YesNo
Remarks:
Is the background information readily distinguishable from the introduction and scop sections? YesNo
Remarks:
12. Are the facts accurate?YesNo
Remarks:
13. Have you eliminated from this section all directions to the contractor to perform tasks specifications of reporting requirements, or a description of deliverable products? YesNo
Remarks:
Scope
<ul><li>14. Will the reader understand the magnitude of the requirement and have a basic understanding of it?</li><li>YesNo</li></ul>
Remarks:
15. Is the scope readily distinguishable from the introduction and background sections? YesNo
Remarks:
16. Is the scope consistent with the activities specified with the end result to be obtained? YesNo
Remarks:

YesNo
Remarks:
18. Have all directions to the contractor to perform tasks, specifications of reporting requirements, or a description of deliverable products been eliminated from this section?YesNo Remarks:
Applicable Directives
19. Is the applicable document properly cited? YesNo
Remarks:
20. If only portions of the document apply, have you clearly stated which portions apply? YesNo
Remarks:
21. Is the document really pertinent to the task? YesNo
Remarks:
22. Do any standard specifications or paragraphs apply in the whole or in part? If so, are they properly cited? YesNo
Remarks:

# Government Furnished Property/Equipment/Information

23. If Government-Furnished Property will be provided, has the nomenclature, quantity, estimated value, serial number, location, and date of delivery to the contractor been stated

request package? YesNo
Remarks:
24. If Government-Furnished Equipment is to be provided, the nature, condition, and availability of the equipment shall be stated. Has this information been included in the PWS? YesNo  Remarks:
Performance Requirements
25. Are the contractor's responsibilities readily distinguishable from the introductions, background and scope sections? YesNo
Remarks:
26. Does the PWS identify only necessary requirements? That is, are the "nice to haves" eliminated? YesNo
Remarks:
27. Is the PWS specific enough to permit you, the writer, to estimate the probable cost and the proposer to determine the levels of expertise, personnel, effort, and other resources needed to accomplish the tasks? YesNo
Remarks:
<ul> <li>a. If no, must provide a level of effort with the Task PWS for the offeror to propose against:</li> </ul>
28. Are the contractor responsibilities stated in such a way that the contractor knows what is required and the government can tell whether the contractor has complied? YesNo

29.	Are sentences written so that there is no question of whether the contractor is obligated to perform specific tasks? (For example, "the contractor shall do this work", not "this work shall be required" – active versus passive voice.) YesNo
	Remarks:
30.	Are the subtasks (major sub-activities) in the PWS presented in chronological order or some other logical order? YesNo
	Remarks:
31.	Does the PWS identify the title of data or other deliverables in parentheses after the subtask that generated the data? YesNo
	Remarks:
32.	If the PWS orders data or reports, have all descriptions of the data (for example, format and content) been eliminated? YesNo
	Remarks:
33.	Have all proposal preparation instructions, evaluation criteria, and references to "the proposer shall" been eliminated? YesNo
	Remarks:
34.	Does the PWS establish a delivery schedule? (Please note that the PWS should not normally establish a delivery schedule, but may include, for clarity, significant milestones.) YesNo
	Remarks:
35.	If elapsed time is used, does it specify calendar days or workdays (For example, "5 business days after receipt of this")? YesNo
	Remarks:

Remarks:

36.	Have all points of control or decision, if applicable, been included? YesNo
	Remarks:
	Does the PWS require the contractor to get permission from or provide something to someone other than the Contracting Officer or the Contracting Officer's Representative? If so, have specific authorizations and instructions been provided to avoid contractual problems? YesNo
	Remarks:
38.	Can the technical representative (COR or Task Monitor) who is asked to sign the acceptance report determine whether the contractor has complied with the requirements? YesNo
	Remarks:
	Have all the elements of quality assurance been fully considered for the total life of the requirement? (You may identify the elements and allow vendors to propose a comprehensive set of measures and metrics). YesNo
	Remarks:
	Are all Government obligations carefully delineated? (If approval actions are to be made by the Government, provide for a time limit. Remember, any provision taking control of the work away from the contractor, even temporarily, must be covered by a contingency reserve if the contractor is to protect itself.) YesNo
	Remarks:
41.	Is the requirement completely described? (to be legal and binding the final agreement must be complete, not only for reasons of legality, but for every practical application. Specify "when" and "where" as well as "what.") YesNo
	Remarks:
42.	Have "catch-all" statements (which generally result either in an expensive disagreement or in a windfall to the contractor) been eliminated? YesNo
	Remarks:

43. Is the requirement over-specified? (The ideal situation is to specify the results required and let the winning contractor find the best method of attainment.) YesNo
Remarks:
44. Has the work been organized into subtasks? (This is helpful in evaluation and may be used for control during performance.) YesNo
Remarks:
45. Have all points-of control, where needed, been included (for example, submission of designs for approval)? YesNo
Remarks:
46. Does the PWS include only such reports and documentation as required for control, documentation of technical results, and follow-on acquisition? YesNo
Remarks:
General
47. Is the PWS written using the format recommended? If not, provide your rationale. YesNo
Remarks:
48. Has extraneous information been eliminated? (Ask the following questions: Does it tell what the contractor is responsible for? It is necessary in order to obtain the required results?) YesNo
Remarks:
49. Have extraneous cross-references to contract clauses and provisions been expunged? YesNo
Remarks:

that they may be acquired on the basis of fixed-price (not cost-reimbursable or Time & Materials)? YesNo	30
Remarks:	
51. Does the PWS bias the effort of a sole source? (The PWS specifies a Government requirement and is required to be impartial concerning who can do it. In keeping with this principle, the PWS should not reference source or proprietary talent) YesNo	
Remarks:	
52. Do the PWS requirements create an organizational conflict of interest? YesNo	
Remarks:	
<ul> <li>a. Will the contractor (offeror) be placed in a position where it cannot provide impartial advice and assistance? For example, does the PWS require the contractor to review its own work?        YesNo</li> </ul>	
Remarks:	
b. Will the contractor (offeror) receive an unfair competitive advantage on this acquisition or future acquisitions based on its performance under past or present acquisitions? For example, have you drafted requirements whereby the contractor will prepare a future PWS that will subsequently be competitive procured?YesNo	
Remarks:	
53. Is more than one interpretation (throughout the PWS) impossible? YesNo	
Remarks:	
54. Has the PWS been checked for grammatical usage?YesNo	
Remarks:	
55. Has the PWS been spellchecked?	

	YesNo		
	Remarks:		
	neadings been checked for for rable? Is the text compatibleYesNo Remarks:		
Prepared by:	Name	Date	-
	Title		
	Organization		
	Phone		
	Email		
Reviewed by:	Name	Date	-
	Title		
	Organization		
	Phone		
	Email		