Washington Headquarters Services (WHS) Acquisition Directorate(AD)

PWS WRITING TIPS

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Why Should We Care About the PWS?

Who is Responsible for the PWS?

Learning Objectives

- Use job analysis <u>before</u> writing the PWS

- Organize the PWS [suggested formats]

- Examine the PWS writing *procedure* and common writing problems

- Understand websites, checklists, and other references for PWS writing

Performance Work Statement (PWS) Defined

"A Statement of Work for performance based-acquisitions that describes the required results in clear, specific, and objective terms with measurable outcomes."
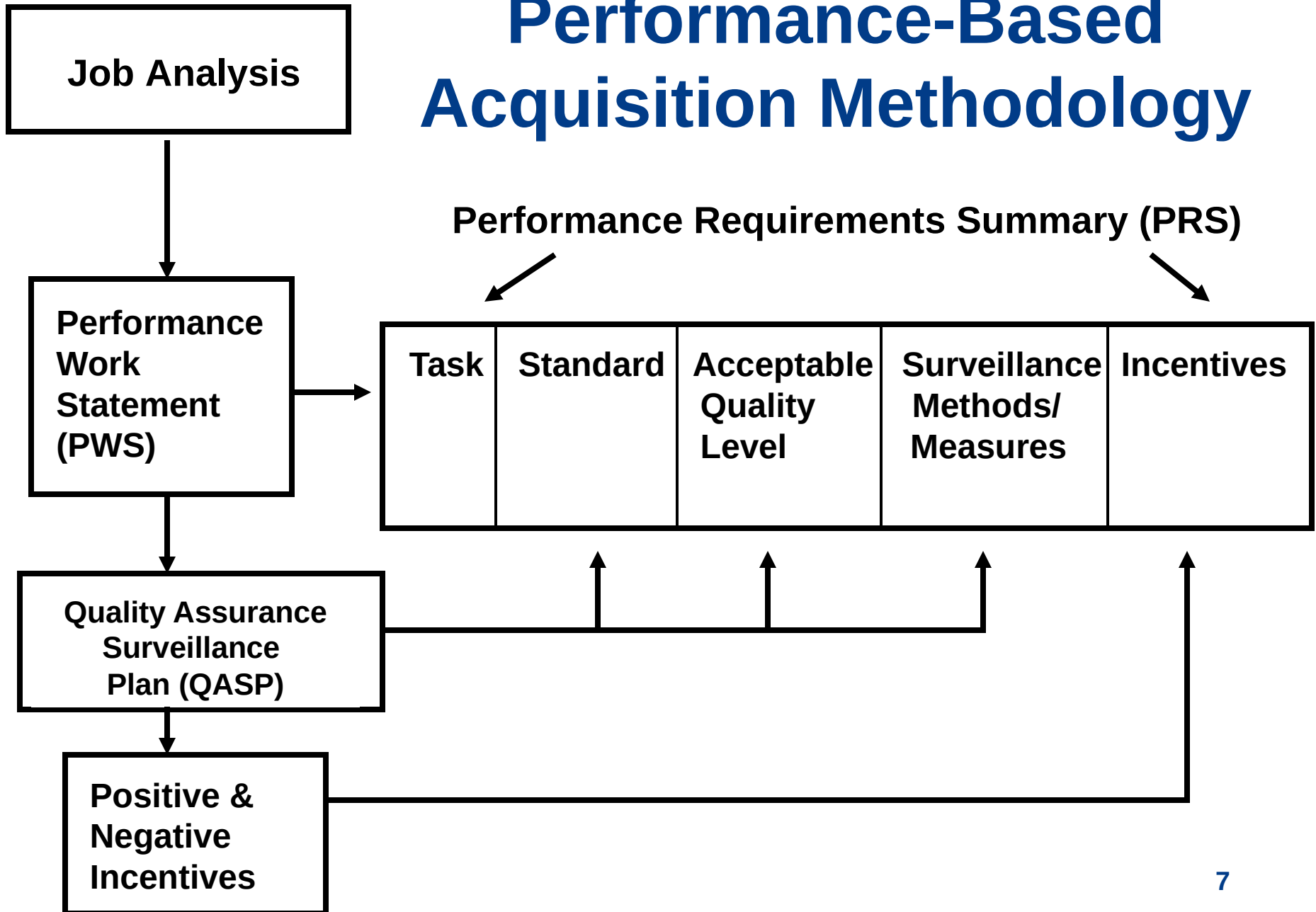
Is It Performance-Based?

- Performance requirements
  - Measurable (objective)
  - Outcome-based
- Performance standards
  - Tied to performance requirements
  - Quality - Quantity - Timeliness
- Quality assurance surveillance plan
  - Measurement of performance against standards
- Positive and negative incentives *considered*
  - Especially if mission critical or expensive
  - Tied to QASP plan measurements

Writing the PWS

- A structured methodology, not a sample (or the current PWS) to cut-and-paste.

- A process, not just a document.

- Starting point: A blank sheet of paper and *some training*.

- Levels of PWS: Read the IDIQ/BPA PWS before writing the order's PWS. (And maybe the GSA Schedule's PWS too!)

- PWS as one part of a contract.

Performance-Based Acquisition Methodology

Job Analysis

Performance Work Statement (PWS)

Quality Assurance Surveillance Plan (QASP)

Positive & Negative Incentives

Performance Requirements Summary (PRS)

Task	Standard	Acceptable Quality Level	Surveillance Methods/ Measures	Incentives

Conduct Job Analysis

- Process: Job Analysis to PWS to QASP
- Systematic approach to analyzing a task
- Step-by-step review of the requirement from contractor perspective
  - **Inputs** (people, facilities, material)
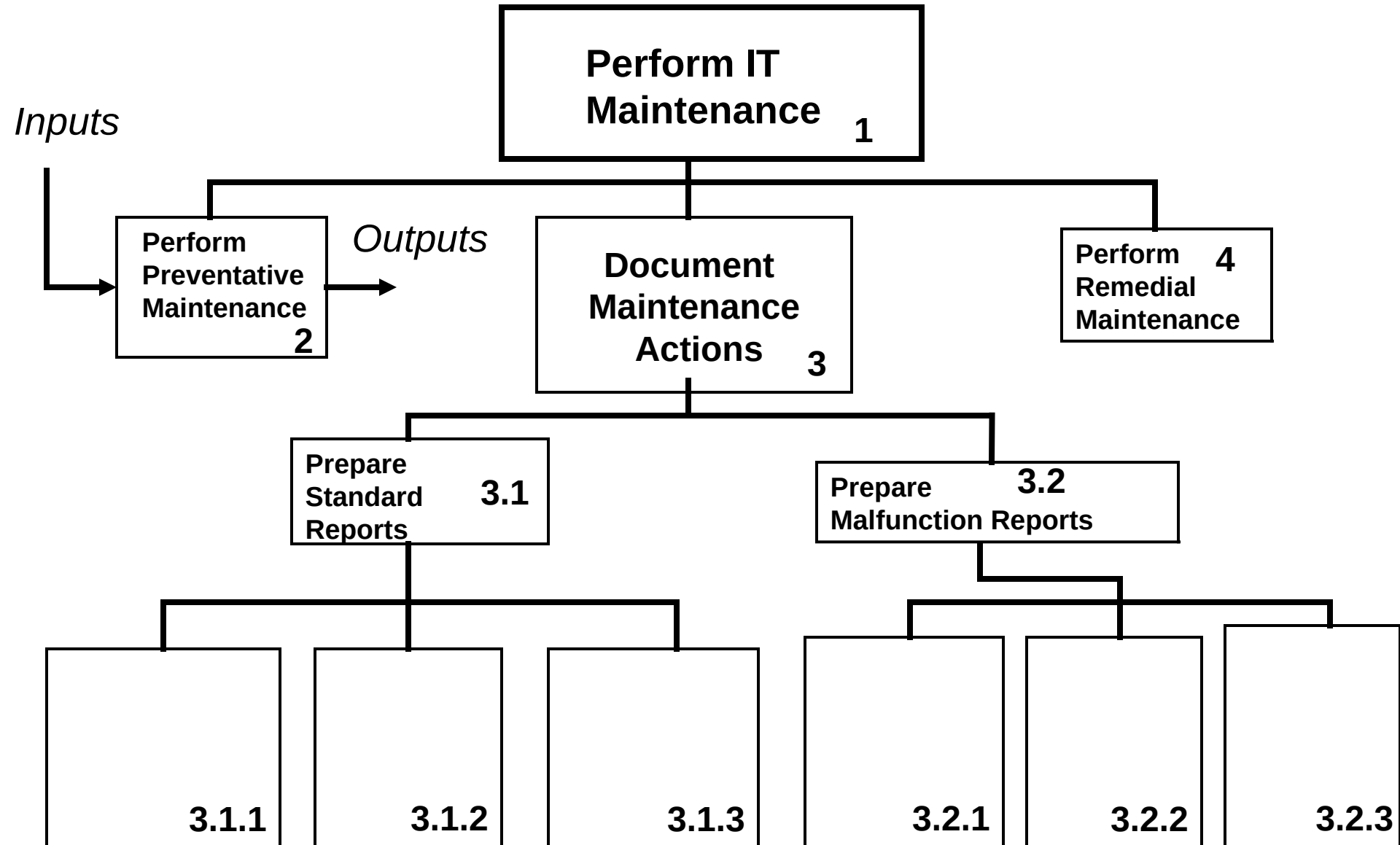 - **Process** (work performed using those inputs)
  - **Output**

Job Analysis – Six Steps

- Conduct Organizational Analysis
- Conduct Work Analysis (use WBS)
- Gather Workload and Resource Data
- Analyze Directives
- Conduct Performance Analysis
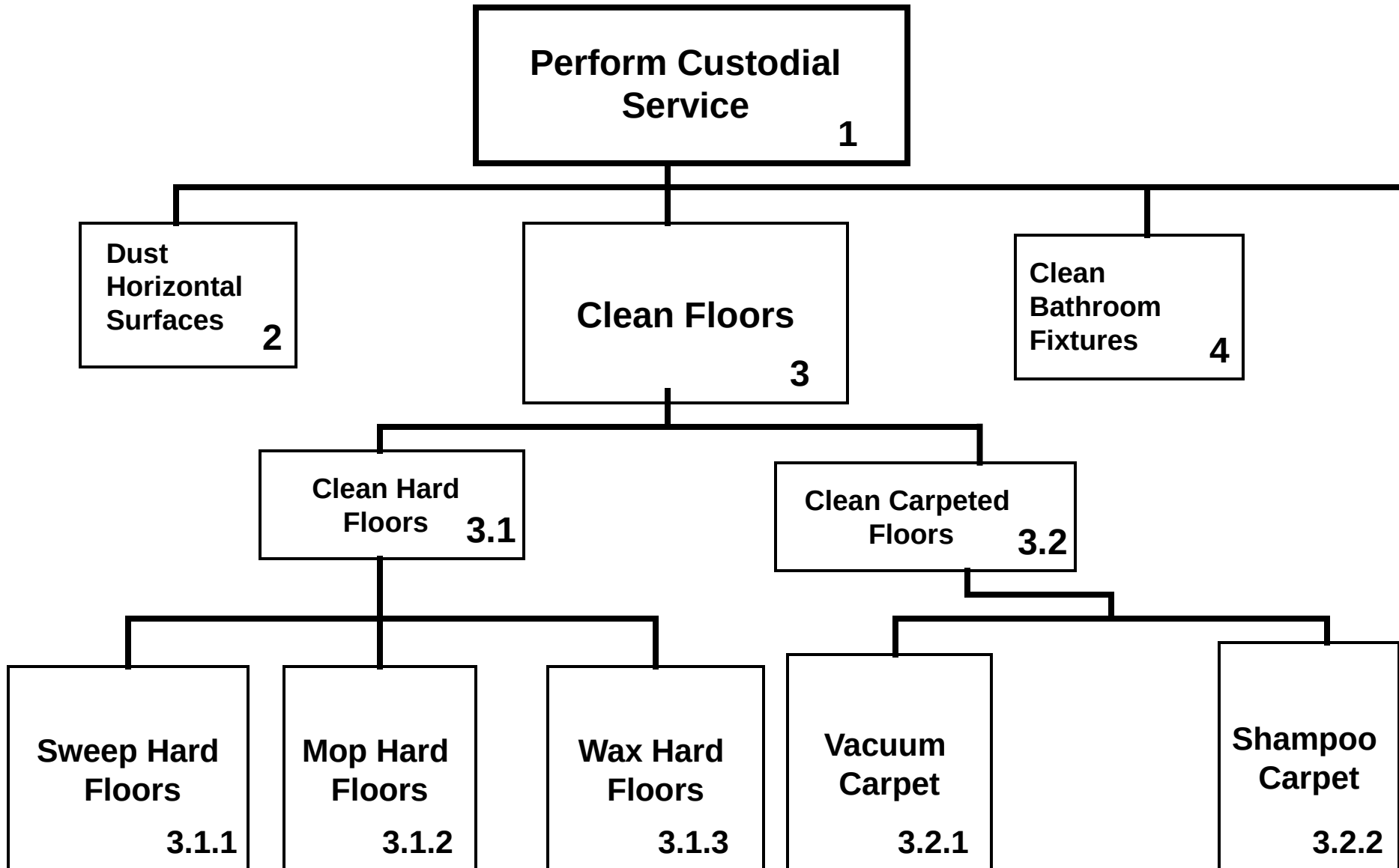- (as required) Analyze Incentives [Deducts]

Conduct Work Analysis (WBS)

- Use tree diagram to break tasks into subtasks, organized from the general to the specific.

- Looks organizational, but is functional. Shows the task, not who performs the task.

- Captures required tasks from organizational analysis, not extraneous tasks.

- Limit to top three levels to avoid defining method of accomplishment.

Work Breakdown Structure – Tree Diagram

Perform IT Maintenance 1

Inputs

Outputs

Perform Preventative Maintenance 2

Document Maintenance Actions 3

Perform Remedial Maintenance 4

Prepare Standard Reports 3.1

Prepare Malfunction Reports 3.2

3.1.1

3.1.2

3.1.3

3.2.1

3.2.2

3.2.3

Work Breakdown Structure – Another Example

Use Tree Diagram in Work Analysis

For each box in the tree diagram (e.g., "4.1.1"), prepare a work (activity) analysis in three sections:

- Input (what starts a job)
- Work (task performed using those inputs)
- Output (all the things or services produced, which can be an input for another numbered task)

Work Analysis Example

Task 4.1.1: Perform Requested Remedial Equipment Maintenance

INPUT	WORK	OUTPUT
Equipment Repair Request	**1. Determine Request Validity**	➢ **Form XXX "Work Pending"**
	2. Document Request	
* Telephone	**3. Dispatch Repair Person**	➢ **Form YYY "Repairs In-Process"**
* Written	**4. Diagnose Malfunction**	
* Walk-in	**5. Repair Malfunction**	*** Equipment Repaired**
		Complete "Service Log " Form #ZZZ

Job Analysis (continued)

Gather Workload & Resource Data

Analyze Directives

Conduct Performance Analysis

Tip: Use Automated Requirements Roadmap Tool (ARRT)

- Uses structured methodology to create tasks for PWS

- Uses a standard PWS template that can be modified

- Exports draft PWS to *MS Word*

- Also creates QASP, PRS, and Evaluation Factors

Writing the PWS

- Varying formats
- Typical contents
  - Scope (Background/Objectives)
  - Applicable Documents
  - Tasks
  - Government-Furnished Items
  - Contractor-Furnished Items
  - Workload Data

A Common DoD Format

1. General Information
   1.1 Scope of Work (or Intro/Scope/Requirements)
   1.2 Contractor Personnel
     1.2.1 Key Employees
     1.2.2 Contractor Employees
     1.2.3 Security Requirements
     1.2.4 Employee Training

Typical Six-Part Format (General Information, continued)

1.3 Quality Control

1.4 Quality Assurance

1.5 Physical Security

1.6 Hours of Operation

1.7 Conservation of Utilities/Environmental Considerations/Hazards

Typical Six-Part Format (continued)

2. Definitions (and/or Acronym List)
    2.1.1 General Definitions
    2.1.2 Technical Definitions

3. Government-Furnished Items & Services
    3.1 Government-Furnished Property
    3.2 Government-Furnished Services
    3.3 Government-Furnished Material

4. Contractor-Furnished Items & Services

Typical Six-Part Format (continued)

5. ***<u>Specific Tasks</u>***

6. Applicable Publications & Forms

<u>Technical Exhibits</u>

    1. Performance Requirements Summary

    2. Workload Estimates

    3. Maps & Work Area Layouts

    4. Identification of Government Facilities, Equipment, and Material

An Alternate Sample Format (Cole & Martin, 6th Ed.)

Part I: General Information

   A. Introduction

   B. Background

   C. Scope

   D. Applicable Documents

Cole & Martin, 6th Ed.(cont.)

Part II: Work Requirements

   A. **Technical Requirements**

   B. Deliverables

Part III: Supporting Information

   A. Security

   B. Place/Period of Performance

   C. GFP/GFM/GFU/GFI

   D. Key Personnel Quals (sparingly)

1. Technical Requirements

- Divide the Work Into Tasks

- Use Functional Descriptions or Performance-Based Descriptions

- Define Requirements

- Describe All Work Elements

Technical Requirements (continued)

5. Describe pertinent previous efforts

6. Describe known risks

7. Ensure descriptions are consistent

8. Describe the tasks in sequence

9. Describe project phasing/milestones

10. Describe the contract management requirements (follow-on historical data)
11. Minimize reporting.

12. Identify **Government** responsibilities & 3rd party interfaces

13. Describe criteria for met requirements

Cole & Martin, 6th Ed.(cont.)

Part II: Work Requirements

    A. Technical Requirements

    B. **Deliverables**

Part III: Supporting Information

    A. Security

    B. Place of Performance

    C. Period of Performance

    D. Special Considerations

2. Deliverables

- What is a deliverable?
- Describing deliverables (cross-ref to PWS)
- Packing, packaging, and marking
- Interim? Final?

Tip: Limit Data Requirements

- Minimize data/deliverables that require Government approval.
- Not: "We've always asked for the _____ Plan!"
- Acquire only the data necessary to:
  - Make a Government decision.
  - Comply with a higher-level requirement.
- Contractor-format where possible

PWS General Check

- True test of a PWS: Prepare your IGCE using only the PWS! (Has the IGCE preparer written [even read?] this PWS?)

- Will the offerors be able to prepare a sound *technical* proposal with only this PWS?

- Will the offerors be able to prepare a sound *cost* proposal with only this PWS?

PWS Objective – Answer Four Questions

- What needs to be done?

- When (and sometimes where) should it be done?

- What should the final output be?

- How will that final output be inspected/accepted?

Tip: PWS is for Contractor Requirements, Not Offeror Instructions

- Things required *before* award do not go into the PWS.

- Remove any references to "offer" or "proposal" or doing *anything* before contract award.

- Contract deliverables are not part of the proposal. Plans in the proposal are not contractor deliverable.

- Remove words of offer evaluation from the PWS.

- Don't include clauses in the PWS.

PWS Content & Style

- Should flow logically from WBS
- Specify WHAT you want done, not HOW you want it done
- Use active voice and strong action verbs
- Avoid generalities and ambiguous phrases
- Minimize abbreviations and acronyms
- "Shall" for contractor, "will" for government
- See web-posted *samples* for wide variety of services
- See AD Policy Blog for some templates (see handout)

Common Ambiguities

- Inconsistency of requirements
- Calling a requirement by different names
- Conflicting or unreasonable schedules
- Incomplete description of requirement
- Vagueness and generalized language
- Use of abstractions
- Unnecessary comments
- Poor sentence construction and poor grammar
- Typos or missing text
- Overly complicated vocabulary/excessively long sentences.

Tip: Get Some PWS Training! (DAU Training)

- ACQ 265 Mission-Focused Services Acquisition
- CLC013 Service Acquisition
- CLL011 Performance-Based Life Cycle Product Support (PBL)
- CLB017 Performance Measurement Baseline
- CLM031 Improved Statement of Work
- WS 001 Service Acquisition Workshop *(strongly recommended by DPAP for services > $100M)*
- TTM 008 Developing Performance Requirements for Service Acquisitions
- TTM 009 Work Statement Workshop (SOW, SOO, PWS)

Tip: Read a Book!

How to Write a Statement of Work, 6th Ed., Peter S. Cole and Michael G. Martin, Management Concepts Press, 2012.

Tip: No Need to Wait for the RFP to Get Comments on the Draft PWS from Industry

Q: Is the first time industry is seeing your PWS the day the entire RFP appears on FedBizOpps?

A: Publicize your DRAFT PWS early!

Additional Questions?

1. Please talk to your Contracting Officer!

2. Dave Clemens, 703-545-0431, david.w.clemens.civ@mail.mil

Additional Slides

PBA & PBSC Defined

<u>Performance-Based Acquisition</u>: "structured around the results to be achieved as opposed to the manner by which the work is to be performed." (FAR 2.101) [note: includes products too!]

<u>Performance-Based [Service] Contracting</u>: "structuring all aspects of an acquisition around the purpose of the work to be performed as opposed as opposed to either the manner by which the work is to be performed or broad and imprecise statements of work." (FAR 37.101)

PWS Regulatory Background

FAR 37.102 Performance Based Acquisition

- From "maximum extent practicable" to "PBA is the preferred method"
- Established order of precedence
  1. Fixed-price performance-based
  2. Not fixed-price but performance-based
  3. Not performance-based

PWS in the FAR

Part 7   Acquisition Planning

Part 11   Describing Agency Requirements

Part 37   Service Contracting

Part 46   Government Quality Assurance

PBA Applies to GSA Schedule Task Orders Too!

"The ordering activity shall document the rationale for using other than a performance-based order." (FAR 8.405-2(e)(7)(ii))

Performance-Based Service Contracts (FAR 37.6) Use…

- <u>Performance Work Statement</u> (PWS)
  - Required results rather than "how"
  - Permit assessment of performance against measurable performance standards

<u>or</u>

- <u>Statement of Objectives</u> (SOO)
  - Purpose
  - Scope/mission/background
  - Period/place of performance
  - Required results (w/ constraints)