



**UNITED STATES MARINE CORPS**

MARINE FORCES RESERVE  
MARINE FORCES NORTH  
2000 OPELOUSAS AVENUE  
NEW ORLEANS, LA 70114-1500

4200  
RCO  
16 Mar 16

FORCE POLICY LETTER 6-16

From: Commander  
To: Distribution List

Subj: CONTRACTING FOR SERVICES WITHIN MARINE FORCES RESERVE AND MARINE FORCES NORTH

Ref: (a) MARADMIN 441/15  
(b) Federal Acquisition Regulation

Encl: (1) Generic Statement of work Template

1. Situation. Per the references, this policy meets the requirement for the establishment of a Service Requirements Review Board (SRRB). The SRRB will implement a service requirements review process that will result in a vetted resource plan supporting validated requirements. Moreover, the structured board will ensure needed oversight and timely decisions for emergent, near-term, and strategic issues requiring resource allocations across the Forces as well as prioritize those requirements while capturing and considering any current year deficiencies.

2. Cancellation. Force Policy Letter 5-11.

3. Mission

a. The SRRB process empowers commanders to improve oversight, shape financial execution, find efficiencies and influence long-term resource support requirements. This process also adds discipline and rigor by: increasing visibility of, and collaboration on requirements among all stakeholders; engaging requirements owners in order to identify, explain, and justify resource requirements; assessing and validating requirements before committing resources and initiating contracting processes or renewing existing requirements; providing for prioritization of resource requirements to support funding decisions; and increasing collaboration on key resource support decisions and foster active management of service acquisitions.

b. When properly used, contracted services are extremely useful and plan an important role in helping commands accomplish its mission. Service contracting is a proper means to acquire special knowledge and skills not available in the government workforce, to obtain cost-effective services which are not inherently governmental functions, and to obtain temporary or intermittent services. It is important to remember that the Government is buying a service or end product when employing a contractor. Desiring a specific individual to perform the service is not a relevant factor in the acquisition process.

c. Inherently governmental functions include activities that require the exercise of discretion in applying Government authority or applying value judgments in making decisions for the Government. Normally, these fall into

DISTRIBUTION STATEMENT A: Approved for public release; distribution is unlimited.

two categories: the act of governing (i.e. the discretionary exercise of Government authority) and monetary transactions and entitlements. Reference (b) lists a number of inherently governmental functions including: the determination of budget policy, guidance, and strategy; determining what supplies and services are to be acquired by the Government; approving any contractual documents; and directing or controlling Federal employees.

d. A personal services contract is one that makes the contractor employee appear to be a government employee due to the employer-employee type relationship it creates. The Marine Corps is not allowed to award personal services contracts unless specifically authorized by statute. This is to avoid the circumvention of federal civil service laws including competitive appointment.

4. Execution. In order to provide command awareness of contractor employees working for Marine Forces Reserve (MARFORRES) and Marine Forces North (MARFORNORTH), ensure the propriety of duties such contractor employees perform, comply with security requirements, and to properly plan for and execute the command budget, all contracted services within MARFORRES/MARFORNORTH will be acquired through the MARFORRES Regional Contracting Office (RCO) after staffing as described herein.

a. Prior to initiating a request for contracted services, MARFORRES/MARFORNORTH Department Heads and Major Subordinate Command (MSC) Staffs shall ensure their requests comply with the guidance and principals set forth herein.

b. MARFORRES/MARFORNORTH Department Heads and MSC Staffs shall prepare a "New Contract Service Request" and Statement of Work enclosure (1) via the following MARFORRES portal: <https://sharepoint.marforres.usmc.mil/sites/csab/SiteAssets/Dashboard.aspx>. The requester shall analyze the requirement by examining the nature of the services, the duration of the requirement, the other available alternatives, and the cost. The analysis shall include a minimum of three alternatives to include assigning the tasks to current personnel, utilizing Marines through Active Duty Operational Support orders, Selected Marine Corps Reserve or Individual Mobilization Augmentees drills, and hiring a contractor. The request shall include a long-term plan to meet any continuing requirement.

c. The SRRB shall consist of the Comptroller, Counsel, Chief of Contracting, MARFORRES Chief of Staff (C/S), MARFORNORTH and such other members as the MARFORRES C/S—or their designated representatives. The MARFORRES C/S shall serve as the SRRB chair and may designate additional member on a permanent or ad hoc basis, as needed.

d. The SRRB will review the request and statement of work, vote on whether the request should be validated, and make a single recommendation regarding validation to the MARFORRES Executive Director who is hereby designated as the Validation Authority.

e. After the request is validated, the originator of the request shall submit a funded Purchases Request to the RCO using authorized procedures and shall provide an appropriate an appropriate line of accounting. The RCO is responsible for properly acquiring the services.

5. Administration and Logistics. Direct any questions concerning this guidance to the MARFORRES RCO.

FORCE POLICY LETTER 6-16

6. Command and Signal. This Policy Letter is applicable to all MARFORRES and MARFORNORTH units and is effective upon the date it is signed.



REX C. MCMILLIAN

DISTRIBUTION: C, D

Directives issued by this Headquarters are published and distributed electronically.

Generic Statement of Work (SOW) Template

**Template Version October 2009**

***Tailor all aspects of this template to the individual acquisition and ensure that any template areas providing sample language or instructions (e.g. italicized and/or red language) are deleted prior to submission.***

The Statement of Work (SOW) format herein is only meant to be a guide and is not necessarily all-inclusive; as such, contents should be tailored to the requirement. Consult your MCFCS Contracting Officer and the Contract Management Process Guide (CMPG) for further guidance.

You 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**

- [Background](#)
- [Objectives](#)
- [Scope](#)
- [Tasks](#)
- [Delivery](#)
- [Government-Furnished Property \(GFP\)](#)
- [Security Considerations](#)
- [Travel](#)
- [Special Material Requirements](#)
- [Other Unique Requirements and Considerations](#)
- [Place of performance](#)
- [Period of performance](#)

Background

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

- 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.

#### 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.
- 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.
- 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.

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. 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.

**Generic SOW Template**

- Tailor specifications and other documents.
- Separate general information from direction.

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/Completion Dates (Estimates and as applicable)

<b>Task Number</b>	<b>Work Milestones</b>	<b>Projected Completion Date</b>
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.

**Delivery**

This section should clearly state:

- What the Contractor must deliver. If different tasks have different delivery requirements, they must be clearly identified.

• **Generic SOW Template**

- 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	dd-mm-yyy
	Government review (as applicable)		dd-mm-yyy
	Resubmit with Government comments	e.g. 5 printed copies and 3 copies on CD-ROM	dd-mm-yyy
2	Identify the specific deliverable	As applicable	dd-mm-yyy
3	Identify the specific deliverable	As applicable	dd-mm-yyy

**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 CMPG 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, e.g. - Unique Item Identification (UID) and Radio Frequency Identification (RFID).

### **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.

---

### *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.

---

- **Generic SOW Template**

---

- 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 Contractor an opportunity to use their standard commercial practices, require each offeror to identify its commercial practices in a proposal and then include that proposal as part of the order/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 (e.g., Marine Corps Field Contracting System (MCFCS)). Spell them out even if they are commonly used by the USMC 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.