35.005 Work statement.

(a) A clear and complete work statement concerning the area of exploration (for *basic research*) or the end objectives (for *development* and *applied research*) is essential. The work statement *should* allow contractors freedom to exercise innovation and creativity. Work statements *must* be individually tailored by technical and *contracting* personnel to attain the desired degree of flexibility for contractor creativity and the objectives of the R&D.

(b) In *basic research* the emphasis is on achieving specified objectives and knowledge rather than on achieving predetermined end results prescribed in a statement of specific performance characteristics. This emphasis applies particularly during the early or conceptual phases of the R&D effort.

(c) In reviewing work statements, *contracting officers should* ensure that language suitable for a level-of-effort approach, which requires the furnishing of technical effort and a report on the results, is not intermingled with language suitable for a task-completion approach, which often requires the *development* of a tangible end item designed to achieve specific performance characteristics. The wording of the work statement *should* also be consistent with the type and form of contract to be negotiated (see 16.207 and 16.306(d)). For example, the work statement for a cost-reimbursement contract promising the contractor's best efforts for a fixed term would be phrased differently than a work statement for a cost-reimbursement completion contract promising the contractor's best efforts for a defined task. Differences between work statements for fixed-price contracts and cost-reimbursement contracts *should* be even clearer.

(d) In preparing work statements, technical and *contracting* personnel *shall* consider and, as appropriate, provide in the *solicitation*-

(1) A statement of the area of exploration, tasks to be performed, and objectives of the research or *development* effort;

(2) Background information helpful to a clear understanding of the objective or requirement (*e.g.,* any known phenomena, techniques, methodology, or results of related work);

(3) Information on factors such as personnel, environment, and interfaces that *may* constrain the results of the effort;

(4) Reporting requirements and information on any additional items that the contractor is required to furnish (at specified intervals) as the work progresses;

(5) The type and form of contract contemplated by the Government and, for level-of-effort work statements, an estimate of applicable professional and technical effort involved; and

(6) Any other considerations peculiar to the work to be performed; for example, any *design-to-cost* requirements.

Parent topic: Part 35 - Research and Development Contracting