
Statement of Work for <Project/Part Name>

Document Number:	XXXXX-SOW	Date:	DD Mmm YYYY
Revision Number:	<1, 2, 3>	Project:	
Author:	Naeem Huque	Department Owner:	SRF Ops

Form Instructions. To be deleted when creating your Statement of Work.

- Use this template for all SRF Ops Statement of Work documents (SOWs).
- The document number must be a relevant set of letters and numerals (e.g. a part/drawing number) followed by "-SOW"
- In the footer on page 2, replace "SRF-08-FM-001 Statement of Work Template" with the document number e.g. "XXXXX-SOW"
- Delete Form Revision Information on the last page.
- Do not add or delete top level sections.
- In Section 14 provide a brief summary of important changes for each revision change. You may delete revision history after 4 subsequent revisions to save space.
-

Consult the Jefferson Lab Editorial Standards documents for guidance on good writing practice at <https://www.jlab.org/sites/default/files/documents/comms/JLabEditorial%20Standards.pdf>

Form Instructions. To be deleted when creating your Statement of Work.

Table of Contents

1	Acronyms	3
2	Introduction	3
3	Scope	3
4	Procurement Officer's Technical Representative (TR)	3
5	Applicable Documents	4
6	Deliverables	4
6.1	Parts	4
6.2	Services	4
6.2.1	Work Task 1	4
6.2.2	Work Task 2	4
6.3	Technical Documentation Package	4
7	Government-Furnished Equipment and Material (if applicable)	4
8	Delivery Schedule	5
9	After Award of Contract	5
10	Meetings	5
10.1	Kick-Off Meeting/Technical Exchange Meeting	5
10.2	Production/Work Readiness Review	5
10.3	In Progress Surveillance/Hold Point	5
10.4	Pre-Shipping Review	6
11	Inspection and Test Plan	6
12	Subcontractor Instructions	6
12.1	Cleanliness	6
12.2	Serialization	7
12.3	Reporting Requirements	7
13	Preparation for Delivery	7
13.1	Exterior Packaging	7
13.2	Individual Packaging	8
13.3	TJNAF Delivery Address	8
14	Release and Revision History	8
15	Approvals	8
1	Form Information	9
2	Form Release and Revision History	9
3	Form Approval	9

1 Acronyms

Use this section to define any acronyms that are in the document

- TJNAF – Thomas Jefferson National Accelerator Facility
- CEBAF – Continuous Electron Beam Accelerator Facility
- CM – Cryomodule
- TR – Technical Representative
- PO – Procurement Officer
- RFQ – Request for Quote
- ARO – After Receipt of Order
- BPS – Braze Procedure Specification
- BPQR – Braze Procedure Qualification Record
- WPS – Welding Procedure Specification
- WPQR – Welding Procedure Qualification Record
- PO# – Purchase Order Number

2 Introduction

Use this section to provide background information on the parts/services to be procured, and the associated project.

3 Scope

Outline the goals of the contract here

This statement of work describes the requirements necessary to produce HOMS H External Pipe for TJNAF

4 Procurement Officer's Technical Representative (TR)

Leave this section text unchanged unless following PO's instruction

The TR is a TJNAF employee assigned to interface with the Subcontractor on technical matters after subcontract award. The TR is only authorized to provide technical direction within the scope of the subcontract. Any modification to the scope or terms of the subcontract must be approved in advance by the TJNAF Subcontracting Officer.

After subcontract award, the TR will assist the Subcontractor in the interpretation of technical requirements as outlined in the contract. Any clarification provided by the TR concerning the work to be performed shall not be construed as a change to the subcontract. Only the TJNAF PO is authorized to accept nonconforming work; waive any requirement of this subcontract; or modify any term or condition of this subcontract.

All direction from the TR and the PO shall be provided in writing.

TR Name:

TR Phone:

TR Email:

5 Applicable Documents

List all the documents that were part of the RFQ. This includes drawings, procedures, specification documents, and standards. Specify whether any of the documents are only for reference.

The following table lists all technical documents provided by TJNAF.

Document Name	Document Number	Rev

Table 1: Applicable Documents

6 Deliverables

List all the deliverables that will come out of the contract. Use bullets or tables where possible. Be as specific and concise as possible. The SOW can cover a contract involving physical parts and/or services.

6.1 Parts

- JLXXXXXX (X3)
- JLYYYYYY (X3)

Part Name	Drawing Number	Rev	Qty.

Table 2: List of Manufactured Parts to be delivered by Subcontractor.

6.2 Services

6.2.1 Work Task 1

- Outline the requirements for the first task

6.2.2 Work Task 2

- Outline the requirements for the second task (these do not need to be chronological)

6.3 Technical Documentation Package

List all the qualification and/or testing documents that are required as part of the contract. Use bullets or a table. Examples include:

- Inspection reports
- Material certificates
- Certificates of compliance

7 Government-Furnished Equipment and Material (if applicable)

List the materials and/or equipment provided to the Subcontractor to aid in the completion of the contract. List in bullet form; examples include:

- Raw material
- Sub-assemblies to be modified (drawings should be included in Section 4, Table 1)

8 Delivery Schedule

State the required delivery dates for the materials and/or services. If the contract requires periodic deliveries in lots, use a table (e.g. Table 3). Delivery dates must be relative to the award/start date (ARO).

Lot	Delivery Date
1	X weeks ARO
2	Y weeks

Table 3: Delivery Schedule

9 After Award of Contract

List the documents that the Subcontractor needs to present after contract award. Specify a timeframe for receiving these documents (e.g. "The following documents must be received one week after PO is issued"). Examples of documents include:

- Quality Manual
- Welding and brazing documents (e.g. BPS, BPQR, WPS, WPQR)
- Milestone payment schedule
- Fabrication Plan
- Inspection and Test Plan (Section 11)

10 Meetings

This section will define meetings held between TJNAF and the Subcontractor to clear hold points and/or milestones. Include any reviews/meetings as required. Examples:

10.1 Kick-Off Meeting/Technical Exchange Meeting

- The purpose is to discuss any open issues with the contract requirements
- List any documents that the Subcontractor needs to present at this meeting
- Define the date of the meeting with respect to the PO award date

10.2 Production/Work Readiness Review

- Held prior to the start of any fabrication work or the start of a service
- List any documents that the Subcontractor must present prior to production/service start.
- Define when any documents must be provided to TJNAF

10.3 In Progress Surveillance/Hold Point

- Can be held at any time(s) during the contract period of performance.
- Surveillance points can be used to get updates on the contract or to audit/witness Subcontractor processes.
- A Hold Point is an intermediate point during the contract where the Subcontractor needs to meet certain conditions in order to continue with contract execution e.g. acceptance of first articles.
- List the requirements required to clear the hold points and/or specify the aims of the surveillance.

10.4 Pre-Shipping Review

- This is a hold point to be cleared prior to manufactured items being shipped to TJNAF
- List any criteria and/or documents that the Subcontractor must provide to TJNAF in order to clear the hold point

11 Inspection and Test Plan

This section details the QC steps carried out by the Subcontractor to determine whether an end product/service is acceptable. The Subcontractor may provide their own inspection plan for TJNAF approval (Section 8).

- Use bullet points for simple test requirements
- Use a table if there are more than three tests to be listed and/or the acceptance criteria requires measurements to fall within a range e.g. Table 5
- For dimensional inspections, define the following:
 - Which dimensions must be measured
 - Are as-measured values required, or only a pass/fail
- Add any reference documents to Section 4

Measurement	Nominal Value	Allowable Range

Table 5: Required tests

12 Subcontractor Instructions

This section will cover any specific steps that are required of the Subcontractor for completing the contract. Do not include details instructions in this section; Section 5 should list all documents. The following should be included.

12.1 Cleanliness

- List all TJNAF or external cleaning procedures/specifications relevant to the contract and the parts to which they apply
- Use a table if multiple specifications are used on multiple parts
- All cleaning documents should also be listed in Section 5, Table 1

Document Name	Document Number	Applicable Parts/Drawings

Table 4: Cleaning documents

- This section may be omitted if the relevant procedures/specifications are already included on drawings

12.2 Serialization

Serialize parts using the following format:

XXXXXX-R-SSS

Where:

XXXXXXXXXX = Part Number

R = Drawing Revision

SSS = Serial number of the part

For Example: The ninth "Widget" (JL0031415 Rev-B) fabricated shall be marked:

JL0031415-B-009

- Adjust the format to use just the serial number if the part is too small for the full number
- If the part is too small for any engraving, ensure that the packaging is properly labeled with the serial number

12.3 Reporting Requirements

Use this section to list a periodic updates and/or documents required of the Subcontractor. This may include the examples below. If more than three independent items are included, use a table e.g. Table 6. Also define the format for any documents e.g. hard copies, email etc.

- Weekly teleconferences
- Monthly written status report
- Quarterly review of NCRs

Item	Description	Frequency	Delivery Format	Due by

Table 6: Reporting requirements

13 Preparation for Delivery

This section outlines the requirements for physical delivery to TJNAF. This section does not apply to services. Use the following as a guideline:

13.1 Exterior Packaging

Provide instructions for shipping manufactured parts. Use bullet points to cover the following general information.

- At a minimum, the packaging should protect the parts from weather and shipping loads
- If required, define any shock or vibration loggers that must be used for each shipment
 - The vendor may suggest the devices to be used
 - If TJNAF is specifying a device, include a list of operating parameters for the unit
- Define any requirements for the outer box e.g. wooden crate, molded-plastic (Pelican cases), pallets

13.2 Individual Packaging

Label each individual package using the following format:

[PROJECT NAME]
[PART NAME] – [DRAWING NUMBER]
PO# XXXXXX
[SERIAL NUMBER]
LOT: XX
SHIPMENT DATE: MM/DD/YYYY

Add other instructions for packaging parts. Examples below:

- Individual parts must be bagged and filled with dry nitrogen
- Individual parts must have protective cushioning with shipment boxes

13.3 TJNAF Delivery Address

Use the following format for the delivery address labeling:

[PROJECT NAME]
[PART NAME] – [DRAWING NUMBER]
[SHIPMENT LOT#]
PO# XXXXX
Attention: Mike Dickey (ext. 7755) / [TR] (ext. XXXX)
Jefferson Lab
12000 Jefferson Ave
Newport News
VA, 23606, USA

14 Release and Revision History

Rev #	Major Changes	Approval Date:
-	Initial version	DD Mmm YYYY
A	<brief description of major changes>	DD Mmm YYYY

15 Approvals

Approved by:	Name:	Signature:	Date:
Author			DD Mmm YYYY
SRF Quality Engineer			DD Mmm YYYY
CAM/STL/PI			DD Mmm YYYY

1 Form Information

Document Number:	SRF-08-FM-001	Effective Date:	23 July 2024
Revision Number:	3	Periodic Review Date:	23 July 2027
Document Owner:	Naeem Huque	Department Owner:	SRF Operations

2 Form Release and Revision History

Rev #	Major Changes	Effective Date:
1	Initial version	31 Mar 2022
2	Periodic review	26 Mar 2024
3	Updated Template	23 July 2024

3 Form Approval

Approved by:	Name:	Signature:	Date:
Document Owner	Naeem Huque	<i>NAEEM HUQUE</i>	Jul 26, 2024
Quality Representative	Ashley Mitchell	<i>Ashley Lynn A Mitchell</i>	Jul 29, 2024
SRF Department Head	Tony Reilly	<i>Tony Reilly</i> <small>Tony Reilly (Aug 5, 2024 11:15 EDT)</small>	Aug 5, 2024











SRF-08-FM-001-R3 Statement of Work Template


Final Audit Report


2024-08-05


Created:	2024-07-26
By:	Allen Samuels (samuels@jlab.org)
Status:	Signed
Transaction ID:	CBJCHBCAABAA_bmu67QdJ617PNeSwsI_nVGb98LCaVki

"SRF-08-FM-001-R3 Statement of Work Template" History

-  Document created by Allen Samuels (samuels@jlab.org)
2024-07-26 - 6:40:01 PM GMT
-  Document emailed to NAEEM HUQUE (huque@jlab.org) for signature
2024-07-26 - 6:41:07 PM GMT
-  Email viewed by NAEEM HUQUE (huque@jlab.org)
2024-07-26 - 6:59:02 PM GMT
-  Document e-signed by NAEEM HUQUE (huque@jlab.org)
Signature Date: 2024-07-26 - 6:59:19 PM GMT - Time Source: server
-  Document emailed to Ashley Mitchell (ashleya@jlab.org) for signature
2024-07-26 - 6:59:21 PM GMT
-  Email viewed by Ashley Mitchell (ashleya@jlab.org)
2024-07-29 - 1:29:09 PM GMT
-  Document e-signed by Ashley Mitchell (ashleya@jlab.org)
Signature Date: 2024-07-29 - 1:29:27 PM GMT - Time Source: server
-  Document emailed to areilly@jlab.org for signature
2024-07-29 - 1:29:29 PM GMT
-  Email viewed by areilly@jlab.org
2024-07-29 - 1:29:45 PM GMT
-  Email viewed by areilly@jlab.org
2024-08-05 - 3:15:26 PM GMT

 Signer areilly@jlab.org entered name at signing as Tony Reilly
2024-08-05 - 3:15:51 PM GMT

 Document e-signed by Tony Reilly (areilly@jlab.org)
Signature Date: 2024-08-05 - 3:15:53 PM GMT - Time Source: server

 Agreement completed.
2024-08-05 - 3:15:53 PM GMT