

## **MARINE CORPS RESEARCH UNIVERSITY TASK DESCRIPTION INSTRUCTIONS**

Orders placed on the MCRU contract will be based on the information provided via the Task Description Form. Revisions to a Task Description, resulting from changes to items such as the statement of work, deliverables, or the task estimate shall be made via the Task Description Revision Form. The following guidance is provided to assist in the completion of the numbered sections of the task description form.

### **GUIDANCE FOR COMPLETING THE TASK DESCRIPTION FORM**

1. **Title** — The PSU performing organization will provide the task title in conjunction with the sponsor.

The Task Description title should be placed on the sponsor representations and certifications page as well (last page of TD).

2. **Type of Task** — The task sponsor recommends whether the task be designated as term/severable, term/non-severable or completion. Input from the MCRU may be used, but the sponsor should make the recommendation. The final decision on severability shall rest with the Contracting Officer at MARCORMATCOM in consultation with the Contracting Officer Representative (COR), legal staff, PSU, and the program sponsor.

Completion Form — This form of task describes the scope of work by stating a clear development path and specifying a well defined end product or goal. The full value of the work can only be achieved if the task is taken to its completion. The completion form is preferred over the term form whenever the work, or specific milestones for the work, can be defined well enough to permit development of estimates within which the contractor can be expected to complete the work. The ability to properly estimate the cost and scope of work effort is critical. The MCRU will be paid fee based upon delivery of the product called for in the Task Description. Care should be taken to ensure that the scope of the work is accurately estimated in the Task Description and the product is properly defined or the MCRU may collect the entire fee without the sponsor receiving the desired product. This may also be a result when the estimate (and the fee pool) is overstated. In a cost overrun situation, the sponsor may elect to provide the funds needed to complete the task, however; these funds may only be provided for additional costs. Additional fee will not be paid in cases where a cost overrun exists.

It is recommended that all efforts determined to be completion tasks be fully-funded upon issuance to the MCRU. This is preferred since under a completion task, work is being placed in order to achieve delivery of an end product and inadequate funding will probably prevent the delivery. However, partial funding will be permitted as long as there is a reasonable expectation that the task will be fully funded. If the task is not fully funded, a revision must be completed in order to define that scope of the task actually expected as well as providing a new funding estimate. The designation of the task as completion may be revisited. Also, at the first indication of a change in the task goal or end product (scope of task), a Task Description Revision should be prepared.

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With the exception of Research and Development (R&D) funded tasks, each completion task can cite only one fiscal year's funds throughout the task performance period (e.g., tasks must be fully funded utilizing only one fiscal year's money). Funds cannot be added for previously unfunded efforts or for any change in scope once the appropriation cited expires for new obligation purposes. In the case of R&D funds, completion tasks can be incrementally funded (i.e., funded with money from different fiscal years) as long as the funds being cited have not expired for new obligation purposes.

Term/Severable Tasks — All term tasks, both severable and non-severable, are level-of-effort tasks. Term tasks are fundamentally about the delivery of effort, NOT end products. The MCRU will be paid for all allowable costs incurred and the fixed fee is payable at the end of the period of performance if effort is deemed satisfactory. In the case of both completion and term effort, there is work to be completed, and often, a reported result; the essential difference involves the specificity with which the work can be defined.

A term severable task normally covers a period of time with work which is continuing in nature. Term severable tasks can be separated into components and/or time periods which can be independently performed to meet the specific needs of the government. This type of task can be incrementally funded over the period of performance specified, provided that the funds being cited do not provide for services beyond the period of availability of the appropriation being cited (e.g., USMC Operations and Maintenance funds are available for one year, R&D funds are available for two years).

Term/Non-Severable Tasks — As stated above, this type of task is level-of-effort in nature with the task being fundamentally about the delivery of effort. Like completion tasks, they are focused on a PARTICULAR, SINGLE END PRODUCT OR GOAL. The full value of the work can only be achieved if all of the work on the task is completed. They are different from completion tasks in that they cannot be sufficiently defined in advance to permit the MCRU and the Government to agree on an accurate, estimated cost to complete. A further distinction is that under a non-severable LOE task, the contractor is only required to provide effort deemed to be satisfactory, not the end product anticipated.

Unlike severable tasks, non-severable tasks generally contain the following characteristics:

- specific and definite end product;
- a single undertaking;
- sufficiently definitized so that the MCRU can perform without further direction; and
- not dependent upon other actions.

Tasks containing numerous items to be performed over a period of time would normally be considered as severable unless there is evidence that such items must be accomplished as a whole. Increasing complexity and length in tasks causes work to be more difficult to define and therefore makes a term task more likely to be severable. Incorrectly describing tasks can give legitimate non-severable tasks the appearance of being severable.

Unlike completion tasks, term non-severable tasks contain significant technical and financial risk. The path to completion of the end item is not clear. Therefore, neither is the estimate.

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As with completion tasks, there is a preference that all term/non-severable tasks be fully funded upon issuance of the task. However, partial funding will be permitted so long as there is a reasonable expectation that the task will be fully funded. If the task is not ultimately fully funded, a revision must be completed in order to define that scope of the task actually expected, as well as a new, funded estimate. The designation of the task as non-severable may be revisited at this time.

Similar to a completion task, with the exception of R&D funds, all tasks funded as non-severable must use the same fiscal year's funds throughout the period of performance of the entire task. Funds cannot be added for previously unfunded efforts or for any change in scope once the appropriation expires for new obligation purposes. For R&D, funds may be obligated incrementally (i.e., from different fiscal years) over the period of performance.

3. **Estimated Completion Date** — Indicate the expected estimated completion date for the Task Description, consistent with the cost estimate, the period of availability of the funds, the task type, and the date of the last deliverable item.

Completion dates and deliverable dates should be stated as \_\_\_\_ months ARO (after receipt of order) instead of a calendar date. This will reduce some of the problems associated with exceeding the completion date of a task.

4. **Total Estimated Cost** — The MCRU through PSU shall indicate the total estimated cost applicable to in-house effort and the total estimated cost applicable to contracted services. PSU shall also indicate the total estimated staff hours for the task. Concurrent with the Task Description, PSU shall provide a detailed cost estimate consistent with this Block 4 estimate.

5. **Sponsor Technical Representative (TR)** — Indicate the name, code, agency, and address of the individual the sponsor has chosen as their Technical Representative. This representative shall provide assistance to the program sponsor in completing information in Block 19. Note: When contract distribution is made, it shall be made to the address shown in this block. Therefore, it is incumbent upon sponsors to keep this information up-to-date.

6. **Sponsor TR Telephone** — Self-explanatory.

7. **Sponsor TR Internet Address** — Self-explanatory.

8. **PSU Technical Representative** — ARL/PSU shall identify the individual responsible for the technical effort.

9. **PSU Technical Representative Telephone Number** — Self-explanatory.

10. **PSU Technical Representative Internet Address** — Self-explanatory.

11. **Security Classification** — Indicate the highest level of Classification (e.g., UNCLASSIFIED, CONFIDENTIAL, SECRET, TOP SECRET) of the work addressed in the Task Description. Each individual Task Description involving a classified effort will require a DD Form

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254 to be submitted with the Task Description form. The task will not be placed on contract until this form is provided.

12. **Task Objective** — Provide a clear, concise, and self-contained statement of the objective of the work to be accomplished.

13. **Description of Work** — Provide a clear and detailed description of work required for the period of performance. This description is key to the designation contained in Block 3. Should either the term/non-severable or completion block be checked, it must be clear that the task, even if there are intermediate products, leads to a defined singular end-product or goal.

14. **Deliverable Products and/or Reports and Schedule** — Identity all deliverables associated with the work requirements including technical reports, hardware, software, other documentation, etc. All deliverables stated or implied in the Description of Work should be listed here. Estimated delivery dates should be indicated either as a specific date or a period of months after receipt of an order (ARO) on the MCRU contract. Unless a specific date is necessary, the latter course is preferable in order to account for possible processing delays (including funding, security and task problems). If a delivery date is constrained by a specific event, then the constraint should be indicated.

15. **Special Requirements** — Provide any requirements regarding document distribution, information concerning purchased, leased or government-furnished property, government furnished information, special test equipment (STE), planned foreign travel, special delivery terms, or any other special provisions required in the performance of the Task Description. To expedite inclusion of the task into the contract, provide as an attachment to the Task Description or list in Block 15 the acquisition value/cost and a brief justification for any facilities to be provided by the government, either as government furnished property or contractor acquired property. See the definitions in FAR 45.101 (a).

All equipment, regardless of cost, must be listed in Block 15 of the Task Description as well. This list should include: cost of the equipment, basis of cost estimate, and justification of technical need.

16. **Subcontracts** — The MCRU shall provide a breakdown of proposed subcontracts necessary for the performance of the proposed work and the estimated amounts of each.

17. **Endorsements** — Both the sponsor and the MCRU must sign indicating agreement on all items contained within the Task Description. Please date the endorsement and provide the telephone number of the signatory.

18. **Sponsor Representations and Certifications** — The Sponsor's Technical Representative shall review and complete this Block as applicable. The sponsor must then be able to certify that all of the conditions outlined in Sections a. through g. have been met and provide an accurate representation of the Task Description. A brief description of each section follows:

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- (1) The person appointed as the Sponsor's Technical Representative must be able to certify that they chose the MCRU to perform the work outlined in the Task Description in accordance with the terms outlined in this section.
- (2) The Technical Representative must also certify that the task has been prepared in accordance with this guidance and provides a complete and accurate description of the work to be performed. In addition, it is agreed that if any changes occur to the work plan, they will be documented in a Task Description Revision.
- (3) MARCORMATCOM relies on the Technical Representative's analysis of the Task Description and its related cost breakdown when evaluating a task for incorporation into a task order. Therefore, the Sponsor's Technical Representative must be able to certify that he/she has in fact reviewed this breakdown as presented in the cost estimate and assessed it as fair and reasonable for performance of the task.
- (4) This is to ensure that any Task Description involving a classified effort is accompanied by a DD Form 254.
- (5) The basic task order contract for the MCRU has been assigned a Defense Priorities and Allocations System (DPAS) rating of DO-A7, in accordance with FAR 11.6. This rating will be carried over to all task orders awarded under the basic contract unless a higher priority is indicated in this space.
- (6) Property identified as Special Test Equipment (STE), as defined at FAR 45.101, must be certified as such in accordance with NAPS 5245.307-2(b). If STE is identified in Block 15 of the Task Description, this certification must be completed in Block 18f.
- (7) In order to comply with SECNAVINST 4200.31C or other related agency guidelines regarding Consulting Services (CS), all Task Descriptions must be reviewed for determination of the appropriate CS designation. The designation as either CS or non-CS must be made and the name and phone number of the person consulted in the comptroller's office must be given.

19. **Certification That Information Is Accurate and Complete** — Self-explanatory.

**MCRU (PSU) Designator** — This number is provided by the MCRU once the Task Description package proceeds through the routing process. This is for internal use only.