So How Do We Buy The Systems That You Operate And Maintain?
The Broad Policy Context

Three Intersecting Processes = Big “A” Acquisition

Planning, Programming, Budgeting and Execution (PPBE)

Joint Capabilities Integration and Development System (JCIDS)

Defense Acquisition System (DAS)

Effective Interaction
Essential for Success

- DODD 5000.01, May 03, Defense Acquisition Sys
- DODI 5000.02, Jan15, Operation of Def Acq Sys
- DODI 5000.74, Jan 16, Def Acq of Services
Major DoD Decision Support Systems

**JCIDS**
- Requirements Management
  - CJCSI 3170.01 series
  - JCIDS Manual
  - User/Service Chief
  - VCJCS/JROC
  - JROC
  - Capability Need
  - Threat/Capability

**Defence Acquisition System**
- Program Management
  - DOD 5000 Series
  - PEO/CAE/DAE
  - Milestones
  - Next Phase
  - System Life Cycle
    - R&D/Proc/O&S
- Contract Management
  - FAR
  - DFARS
  - PCO/HCA/SPE
  - DCMA
  - Business Clearance
  - Contracts
  - Contractor Performance

**PPBE**
- Resource Management
  - DPG/POM/Budget
  - DoD 7000 Series
  - PEO/Service HQ/OSD
  - OMB/Congress
  - DMAG
  - Funding/Resources
  - Annual Funding
  - & FYDP

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**Rules**
- CJCS: Chairman, Joint Chiefs of Staff
- CJCSI: Chairman, Joint Chiefs of Staff Instruction
- CAE: Component Acquisition Executive
- DAB: Defense Acquisition Board
- DMAG: Deputy’s Management Advisory Group
- DFARS: Defense FAR Supplement

**Players**
- DOD 5000 Series
- PEO/CAE/DAE
- Business Clearance
- Contracts
- Contractor Performance

**Reviews**
- Threat/Capability
- System Life Cycle
- R&D/Proc/O&S

**Decisions**
- Capability Need
- Next Phase
- Requirement
- Oversight Council
- Management
- Approval

**Focus**
- JCIDS: Joint Chiefs of Staff Instruction
- CJCSI: Chairman, Joint Chiefs of Staff Instruction
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Defense Systems Management College
Defense Acquisition University
Fort Belvoir, Virginia

DoD Requirements Overview
DoD PPBE Overview
Defense Systems Management College
Defense Acquisition University
Fort Belvoir, Virginia

DoD Acquisition Overview
Defense Acquisition System Overview

- Governing policies and guidance
- Decision chain and oversight
- Defense Acquisition System (DAS): Materiel Development Decision through Operations & Support
Operation of the Defense Acquisition System

- Emphasizes affordability, cost considerations—integrates DAS with PPBE and JCIDS processes
- Defines acquisition categories (ACAT) and associated oversight levels
- Describes generic acquisition life cycle—milestones and phases are to be tailored to program needs
- Statutory and regulatory compliance items covered in Enclosure 1 tables, by ACAT level and phase
MDD is the initial **formal interface** between JCIDS and the DAS processes.

When an ICD recommends a **materiel approach** to resolve a warfighting capability gap, the JROC or Service ROC recommends the MDA convene a MDD Review.

Where does the logistics community play?
• 5 Phases
• 3 Milestone Decisions – A, B, C
• 4 Other Decision Points:
  - Materiel Development Decision (MDD), “Mandatory” Entry
  - Capability Development Document (CDD) Validation Decision
  - Development RFP Release Decision
  - Full-Rate Production (FRP) Decision
The Acquisition Chain of Authority

**Defense Acquisition Executive USD(AT&L)**

**DAE**
- Makes ACAT ID and IAM Decisions
- Signs Acquisition Decision Memorandum (ADM)

**Defense Acquisition Board**
- Advice to DAE

**Component HQ Review**
- Issue resolution

**ACAT ID**
- $480 M RDT&E or $2.79 B Procurement or MDA Special Interest

**ACAT IA**
- $520 M Life Cycle Cost or $165 M Total Program Cost or $40 M Program Cost in any single year or MDA Special Interest

**ACAT IC/IAC**
- $185 M RDT&E or $835 M Procurement or MDA designation

**ACAT II**
- $185 M RDT&E or $835 M Procurement or MDA designation

**ACAT III**
- No Fiscal Criteria [Does not meet criteria above.]

**ACAT IV**
- Used by Navy/USMC

**Program Executive Officer (Gen Officer/SES)**
- Makes ACAT III decisions
- Signs ADM

**Program Manager (Col/LtCol/Civilian Equiv)**
- Makes ACAT III and IAM Decisions
- Signs ADM

**Logistics is represented at every level**
Materiel Solution Analysis (MSA) Phase

**Purpose:**
- Conduct the analysis and other activities needed to choose the concept to be acquired
- Begin translating validated capability gaps into system specific requirements including KPPs, KSAs, and APAs (where is logistics?)
- Conduct planning to support a decision on the acquisition strategy

**Major Events:**
- Analysis of Alternatives reviews

**Guided by:** ICD, MDD ADM, AoA Study Guidance, AoA Study Plan
• Component Acquisition Executive selects a Program Manager (PM)

• Conduct the Analyze alternative materiel solutions activities needed to choose the product concept

• PM develops the acquisition strategy to mature technology and reduce risk

• PM develops the functional strategies to support the capability development

• PM and Requirements Manager (RM) prepare a preliminary Reliability, Availability, Maintainability and Cost (RAM-C) rationale report

• RM develops draft CDD/ Problem Statement; including the CONOPs/OMS/MP/Use Cases
Technology Maturation and Risk Reduction (TMRR) Phase

Major Events:
- Design Reviews (only PDR is required)
- Early assessments (EOAs and ILAs)
- CDD Validation
- Development RFP Release
- Technology Readiness Assessment

Purpose:
- Reduce technology, engineering, integration and life cycle cost risk
- Demonstrate critical technologies on Prototypes
- Develop an acquisition strategy to support the decision to proceed into development, production and sustainment

Guided by: Acq Strategy, MS A ADM, sponsor-approved draft CDD/Problem Statement and other program documents (PPP, SEP, LCSP, TEMP)
At Milestone A the focus is on **how to mature appropriate technology** and **reducing risks** through demonstration

- PM reduces risk through competitive prototyping (req’d for MDAPs unless MDA approves waiver)
- PM conducts **Preliminary Design Review(s) (PDR)** to review the initial design
- PM assess technology readiness for EMD
- PM and RM conduct *an* annual **Configuration Steering Board (CSB)**
- RM supports CDD/ Problem Statement Validation decision; including the **CONOPs/OMS/MP/Use Cases**
- PM completes **draft RFP** review to support Development RFP Release decision
• Acquisition Strategy

• Acquisition Program Baseline (APB) [KPPs from user requirements]

• Systems Engineering Plan (SEP) [RAM-C report attached]

• Test & Evaluation Master Plan (TEMP) [includes COIs]

• Life Cycle Sustainment Plan (LCSP) [addresses sustainment KPP and KSAs]

• Program Protection Plan (PPP) [identifies critical technologies & Defense Exportability Features (DEF)]

DoDI 5000.02, Enclosure 1, Table 2 provides more specific detail
Engineering and Manufacturing Development (EMD) Phase

Major Events:

- Design Reviews (only CDR is required; PDR also if PDR prior to Milestone B was waived)
- Developmental Test & Evaluation (DT&E) / Operational Assessments (OAs)
- Independent Logistics Assessments (ILAs)
- Capability Production Document (CPD) Validation
- Production and Deployment RFP release and source selection

Guided by: Acquisition Strategy, MS B ADM and APB, validated CDD/Problem Statement, and other planning documents (PPP, SEP, LCSP, TEMP)

Purpose:

- Develop, build and test a product to verify all operational and derived requirements are met
- Support production and deployment decisions
At Milestone B normally **formal program initiation** with approval of the Acquisition Program Baseline (APB)

At Milestone B referred to as a “**Program of Record (POR)**” - commits required investment resources to the program

- PM completes hardware/software detailed design of an integrated system
- PM demonstrates design through appropriate development test & evaluation and assessments
- PM aligns technology, manufacturing and **sustainment readiness** to support production and deployment
- PM develops **system product support** attributes
- PM completes **Critical Design Review(s)**
- RM supports CPD/ Problem Statement Validation
- PM completes **draft RFP** review to support P&D
- PM conducts program tracking through acquisition reporting
• **Core:** Logistics capability required to perform maintenance and support of *mission-essential* equipment (Title 10, Section 2464)

• **50/50:** Restricts use of *non-federal* government workers performing depot level maintenance and repair to 50% of allocated funding* (Title 10, Section 2466)

• **Competition:** Mandates public/private *competition or merit-based selection* for existing depot level work valued at > $3M (Title 10, Section 2469)

• **CITE:** authorizes/encourages organic repair depots *partnering* with Centers of Industrial and Technical Excellence (CITE), enables depot activities to *become formal subcontractors* (Title 10, Section 2474)

* Reported at the Service level, not program
Production and Deployment (P&D) Phase

Purpose:
• To produce and deliver requirements-compliant products to receiving military organizations

Major Events
• Production and Test Readiness Reviews
• IOT&E/LFT&E
• FRP/FD decision
• Production RFP Release

Guided by: Acquisition Strategy, MS C ADM, sponsor-approved CPD/Problem Statement and other planning documents (PPP, SEP, LCSP, TEMP)
At Milestone C the program is reviewed for entrance into the Production and Deployment Phase (or Limited Deployment for software intensive systems)

- PM executes Low-rate Initial Production and Limited Deployment
- Complete Operational Test and Evaluation
- DOT&E completes Beyond LRIP Report*
- PM ensures Limited Deployment (LD) for software intensive systems
- PM establishes the Product Support Capability
- PM executes Full-rate Production and Full Deployment
- PM conducts product support draft RFP review

* DoDI 5000.02 calls it “DOT&E Report on IOT&E”
Operations & Support (O&S) Phase

Major Events:
• Begins when the first system is fielded
• Modifications and technology insertion
• MDA approved Life Cycle Sustainment Plan

Guided by: Acquisition Strategy, MS C ADM and APB, sponsor-approved CPD/Problem Statement and other planning documents (PPP, SEP, LCSP, TEMP)

Purpose:
• To execute the product support strategy
• Satisfy materiel readiness and operational support performance requirements
• Sustain the system over its life cycle (to include disposal)
• PM continues with Full-rate Production and Deployment
• PM implements and adjusts the Product Support Strategy based on evolving operating, threat and budget environment
• PM collects feedback and evaluates operations and support activities
• PM implements modifications, including technology insertion activities
• PM evaluates program resources and ensures intellectual property deliverables and associated license rights, tools, equipment, and facilities are acquired
• PM fully establishes organic or industry depot maintenance capability in accordance with statute and the LCSP
• PM implements Disposal planning and execution
Great Help for locating just about anyone in DoD (formerly the “White Pages”)

- [https://dod411.gds.disa.mil/](https://dod411.gds.disa.mil/) (CAC login required, choose e-mail version)

Links to more common OSD sites:

- [http://www.defense.gov/osd](http://www.defense.gov/osd) (connects you to all OSD sites)
- [http://www.acq.osd.mil/](http://www.acq.osd.mil/)
- [http://www.pae.osd.mil/](http://www.pae.osd.mil/) (actually takes you to the CAPE web site)
- [https://dap.dau.mil/](https://dap.dau.mil/)
- [http://www.dote.osd.mil/](http://www.dote.osd.mil/)

Good general information site:

- [http://www.cbo.gov](http://www.cbo.gov)
Materiel Acquisition Process

Additional References

• Defense Acquisition Portal
  ➤ https://dap.dau.mil

• Better Buying Power (BBP) Gateway
  ➤ http://bbp.dau.mil

• ACQuipedia
  ➤ https://acquipedia.dau.mil

• Acquisition Community Connection
  ➤ https://acc.dau.mil

• Program Managers e-Tool Kit
  ➤ https://pmtoolkit.dau.mil

• 2014 Acquisition Process Chart

• DOD Acquisition Net
  ➤ www.acq.osd.mil
QUESTIONS?
# DAB Membership

**Chair:** USD(AT&L)

**Members**

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**Advisors**

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Others as Required
Technology Readiness Assessment (TRA)

- **Begins in MSA Phase:**
  - Technology risk is assessed against the ability to deliver the desired capability
  - Documented in the AS and SEP

- **By End of TMRR Phase**, technology maturity is demonstrated sufficiently to verify development risk is at an acceptable Level

- **During EMD Phase**, maturity of technology is assessed to ensure it meets stated requirements and it can be manufactured

- **Prior to a Production Decision**, technology maturity risks must be acceptable, including any new technology insertion considerations

- **TRA results support the Capability Production Document (CDD/CPD)**

- **Technology Readiness Levels (TRLs)** serve as a common definition for evaluating technology maturity
Manufacturing Readiness Assessment (MRA)

- **Begins in MSA Phase**, manufacturing readiness and risk are assessed and documented in the SEP
- **By End of TMRR Phase**, manufacturing processes is demonstrated to the extent needed to verify risk is at an acceptable Level
- **During EMD Phase**, maturity of critical manufacturing processes will be assessed to ensure they are affordable and executable
- **Prior to a Production Decision**, manufacturing risks must be acceptable, supplier qualifications completed, and manufacturing processes are or will be under statistical process control
- **MRA results support the Capability Production Document (CDD/CPD)**
- **Manufacturing Readiness Levels (MRLs)** serve as a common definition for evaluating manufacturing maturity
Independent Logistics Assessment (ILA)

- **Begins in MSA Phase**, sustainment readiness and risk are assessed, supportability objectives and KPP/KSA requirements defined.

- **By End of TMRR Phase**, maintenance concepts and sustainment strategy complete; LSCP approved.

- **During EMD Phase**, support features embedded in design, support capabilities demonstrated, and SCM approach validated.

- **During P&D Phase**, product support package demonstrated in operational environment, performance measures in place.

- **ILA results support the Capability Production Document (CDD/CPD)**.

- **Sustainment Maturity Levels (SMLs)** serve as a common definition for evaluating sustainment maturity (**new concept**).
Model 1: Hardware Intensive Program

- The “classic” approach: requirements drive one final capability, complex, usually defense unique, hardware program that will be fully deployed.

- **Examples:** Trucks

- **Note:** Program deploys with full capability described in the CDD.
• Complex, usually defense unique, software program that will not be fully deployed until several software builds have been completed

• **Examples:** command and control systems and significant upgrades to the combat systems found on major weapons systems such as surface combatants and tactical aircraft

• **Note:** Several software builds are typically necessary to achieve a deployable capability
Model 3: Incrementally Fielded Software Intensive Program

- Full capability occurs in multiple increments as **new** capability is developed and delivered.

- **Examples:** Business systems, upgrades to command and control systems or weapon systems.

- **Note:** Caution can be structured so the program is overwhelmed with frequent milestones/deployment decision points.
Model 4: Accelerated Acquisition Program

- Applies when schedule considerations dominate over cost and technical risk considerations. Compresses or eliminates phases of the process and accepts potential inefficiencies.

- **Examples:** Quick reaction programs, MRAP or bunker buster bomb.

- **Note:** Used when technological surprise by a potential adversary necessitates a higher risk acquisition program. Mature technology supports rapid acquisition considerations.

Reference: DoDI 5000.02, Enclosure 13, DoDD 5000.71, and DoDI 8510.01 (IT systems)
Combines hardware development as the basic structure with software intensive development occurring simultaneously.

Examples: F-22

Note: Design, fabrication, and testing of physical prototypes may determine overall schedule, decision points, and milestones, but software development will often dictate the organization, pace of test and program execution.
Model 6: Hybrid Program B (Software Dominant)

- Includes a mix of incrementally fielded software products or releases that include intermediate software builds
- **Examples:** GPS Control Segment
- **Note:** Configuration control and recurring training may drive effectiveness
<table>
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<tr>
<th>MILESTONE A INFORMATION REQUIREMENTS</th>
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<tbody>
<tr>
<td>ALL PROGRAMS EXCEPT WHERE NOTED (SEE TABLE 2, DODI 5000.02)</td>
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<tr>
<td><strong>2266a Determinations (MDAP only)</strong></td>
<td><strong>DoD Component Cost Position (CCP) (MDAP &amp; MAIS only)</strong></td>
</tr>
<tr>
<td>Acquisition Decision Memorandum (ADM)</td>
<td><strong>Economic Analysis (MAIS only) may combine w/AoA</strong></td>
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<tr>
<td><strong>Acquisition Strategy (see text of DoDI 5000.02 for additional requirements)</strong></td>
<td><strong>Exit Criteria</strong></td>
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<tr>
<td>- Benefit Analysis &amp; Determination</td>
<td><strong>Frequency Allocation Application</strong></td>
</tr>
<tr>
<td>- Consideration of Technology Issues (MDAP &amp; MAIS only)</td>
<td><strong>Full Funding Certification Memorandum (MDAP &amp; MAIS only)</strong></td>
</tr>
<tr>
<td>- Cooperative Opportunities</td>
<td><strong>Independent Cost Estimate (MDAP &amp; MAIS only)</strong></td>
</tr>
<tr>
<td>- Industrial Base Capabilities Considerations</td>
<td><strong>Item Unique Identification Implementation Plan</strong></td>
</tr>
<tr>
<td>- Intellectual Property Strategy</td>
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</tr>
<tr>
<td>- Market Research</td>
<td><strong>Life-Cycle Sustainment Plan</strong></td>
</tr>
<tr>
<td>- Small Business Innovation Research/Small Business Technology Transfer Program Technologies</td>
<td><strong>Program Certification to the Defense Business Systems Management Committee (DBS only)</strong></td>
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<td>- Termination Liability Estimate (MDAP only)</td>
<td><strong>Program Protection Plan (PPP)</strong></td>
</tr>
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<td><strong>Affordability Analysis</strong></td>
<td><strong>Replaced System Sustainment Plan (MDAP only)</strong></td>
</tr>
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<td><strong>Analysis of Alternatives (AoA) Report</strong></td>
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<td><strong>System Threat Assessment Report (STAR)</strong></td>
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<td><strong>Systems Engineering Plan (SEP)</strong></td>
</tr>
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<td>- Cost Analysis Requirements Description (CARD) (MDAP &amp; MAIS only)</td>
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</tr>
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<td>- Cybersecurity Strategy</td>
<td><strong>Test &amp; Evaluation Master Plan (TEMP)</strong></td>
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<td>- DoD Component Cost Estimate (CCE) (MDAP &amp; MAIS only)</td>
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Statutory Requirements in blue italics

- DBS: Defense Business Systems
- MAIS: Major Automated Information System
- MDAP: Major Defense Acquisition Program
DEVELOPMENT RFP RELEASE
INFORMATION REQUIREMENTS
ALL PROGRAMS EXCEPT WHERE NOTED (SEE TABLE 2, DODI 5000.02)

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<thead>
<tr>
<th>Requirements</th>
<th>Notes</th>
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<tbody>
<tr>
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**Acquisition Decision Memorandum (ADM)**
- Acquisition Program Baseline (APB)
- Acquisition Strategy (see text of DoDI 5000.02 for additional requirements)
  - Benefit Analysis & Determination
  - Consideration of Technology Issues (MDAP & MAIS only)
  - Contract Type Determination (MDAP only)
  - Industrial Base Capabilities Considerations
  - Intellectual Property Strategy
  - Market Research
  - Small Business Innovation Research/Small Business Technology Transfer Program Technologies
  - Termination Liability Estimate (MDAP only)

**Affordability Analysis**
- Analysis of Alternatives (AoA) Report
- Bandwidth Requirements Review
- Capability Development Document (CDD) - Validated
- Concept of Operations/Operational Mode Summary/ Mission Profile (CONOPS/OMS/MP)
- Core Logistics Determination/Core Logistics Sustaining Workloads Estimate (MDAP only)

**Cost Analysis Requirements Description (CARD)** (MDAP & MAIS)
- Cybersecurity Strategy
- Development RFP Release Cost Assessment
- Economic Analysis (MAIS only) may combine w/AoA
- Exit Criteria
- Information Support Plan
- Item Unique Identification Implementation Plan
- Life-Cycle Mission Data Plan
- Life-Cycle Sustainment Plan
- Low Rate Initial Production (LRIP) Quantity
- Program Protection Plan (PPP)
- Request for Proposal (RFP)
- Should Cost Target
- System Threat Assessment Report (STAR)
- Systems Engineering Plan (SEP)
- Technology Readiness Assessment (MDAP only)
- Test & Evaluation Master Plan (TEMP)

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- MDAP: Major Defense Acquisition Program
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<td>LRIP Quantities (MDAP, ACAT II &amp; III only)</td>
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<td>Programmatic Environmental Safety &amp; Occupational Health Evaluation (PESHE) and NEPA/E.O. 12114 Compliance</td>
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<td>Replaced System Sustainment Plan (MDAP only)</td>
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<td>Should-Cost Target</td>
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<td>Spectrum Supportability Risk Assessment</td>
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<td>Systems Engineering Plan (SEP)</td>
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<tr>
<td>Technology Readiness Assessment (TRA) (MDAP only)</td>
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<tr>
<td>Test &amp; Evaluation Master Plan (TEMP)</td>
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<tr>
<td>Waveform Assessment Application</td>
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*Updated and re-submitted only if changes have occurred since approved at the Development RFP Release Decision.*

Statutory Requirements in blue italics

**DBS:** Defense Business Systems

**MAIS:** Major Automated Information System

**MDAP:** Major Defense Acquisition Program
• 2366b Certification Memorandum (MDAP only) (only if Milestone C is program initiation)
• Acquisition Decision Memorandum (ADM)
• Acquisition Program Baseline
• Acquisition Strategy (see text of DoDI 5000.02 for additional requirements)
  - Benefit Analysis & Determination (only if no MS B)
  - Contract Type Determination (MDAP only)
  - General Equipment Valuation
  - Industrial Base Capabilities Considerations
  - Intellectual Property Strategy
  - Small Business Innovation Research/Small Business Technology Transfer Program Technologies
  - Termination Liability Estimate (MDAP only)
• Affordability Analysis
• Analysis of Alternatives (updated only if required)
• Bandwidth Requirements Review
• Capability Production Document (CPD) - validated
• Clinger-Cohen Act (CCA) Compliance
• CONOPS/Operational Mode Summary/Mission Profile (CONOPS/OMS/MP)
• Core Logistics Determination/Core Logistics Sustaining Workloads Estimate (MDAP only)
• Cost Analysis Requirements Description (CARD) (MDAP & MAIS only)
• DBS: Defense Business Systems (MDAP & MAIS only)
• DoD Component Cost Position (CCP)
• DoD Component Cost Position (CCP) (MDAP & MAIS only)
• Exit Criteria
• Frequency Allocation Application
• Full Funding Certification Memorandum (MDAP & MAIS only)
• Independent Logistics Assessment (ILA) (MDAP only)
• Independent Cost Estimate (MDAP & MAIS only)
• Information Support Plan (ISP)
• Item Unique Identification Implementation Plan
• Life-Cycle Mission Data Plan
• Life-Cycle Sustainment Plan (LCSP)
  - Preservation and Storage of Unique Tooling Plan (MDAP only)
• Problem Statement (DBS only)
• Program Protection Plan (PPP)
• Programmatic Environmental Safety & Occupational Health Evaluation and NEPA/E.O. 121114 Compliance
• Request for Proposal (RFP)
• Should-Cost Target
• Spectrum Supportability Risk Assessment
• System Threat Assessment Report (STAR)
• Systems Engineering Plan (SEP)
• Technology Readiness Assessment (MDAP only) (only if Milestone C is program initiation)
• Test & Evaluation Master Plan (TEMP)
• Waveform Assessment Application

Statutory Requirements in blue italics

Updated Information

DBS: Defense Business Systems
MAIS: Major Automated Information System
MDAP: Major Defense Acquisition Program
### Full-Rate Production/Full Deployment Information Requirements

All programs except where noted (See Table 2, DODI 5000.02)

<table>
<thead>
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</thead>
<tbody>
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<td>• Live-Fire Test &amp; Evaluation Report (DOT&amp;E Oversight programs only)</td>
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<td>- Small Business Innovation Research/Small Business Technology Transfer Program Technologies</td>
<td>• Operational Test Agency Report of OT&amp;E Results</td>
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<td>- Termination Liability Estimate (MDAP only)</td>
<td>• Program Certification to the Defense Business Systems (DBS) Management Committee (DBS only)</td>
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<td>• DOT&amp;E Report on Initial Operational Test &amp; Evaluation (IOT&amp;E) (DOT&amp;E Oversight List programs only)</td>
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**Updated Information**

- Acquisition Decision Memorandum (ADM)
- Clinger-Cohen Act (CCA) Compliance
- Cost Analysis Requirements Description (CARD)
- DoD Component Cost Estimate (CCE)
- Cybersecurity Strategy
- DOT&E Report on Initial Operational Test & Evaluation (IOT&E) (DOT&E Oversight List programs only)
- DoD Component Live Fire Test & Evaluation Report (DOT&E Oversight List programs only)