Statement of Work Defined:
A Statement of Work (SOW) is a formal document that defines the work (tasks, services, and deliverables) a contractor must perform under the contract.

The Importance of an Effective Scope of Work:

The Scope of Work (SOW) is a foundational element of the University's procurement process for public bidding and quotation solicitations. The SOW defines the specific tasks, deliverables, and standards required from a contractor, and serves as the blueprint for project execution. A well-crafted and successful SOW ensures transparency, reduces ambiguity, and promotes fair competition by clearly communicating the University's expectations to all potential bidders. The SOW also serves as the basis for evaluating proposals, managing performance, and resolving disputes. Overall, a comprehensive and accurate SOW is essential to achieving project goals on time and to ensuring the contractor provides all services or goods in a manner advantageous to the University.

End-User Responsibility:

It is the responsibility of the End-Users to prepare and submit the SOW to Procurement Services for all managed solicitations. The SOW must clearly define the project scope, deliverables, timelines, performance requirements, and any other specifications to ensure the proposed services and/or goods fully meet the University's needs. The SOW should also be clearly written and sensibly organized so that bidders can easily understand and maneuver through the information and submit meaningful responses. The use of vague, incomplete, or overly broad language may lead to misinterpretation, inconsistent submissions, and delay the process by requiring project addenda to resolve any such issues.

Procurement Services Responsibility:

Procurement Services has oversight and shall act as the final approver regarding all language within public bids and managed solicitations. While End-Users are responsible for developing the technical content, all final documents, including specifications and terms and conditions, are subject to review, modification, and approval by Procurement Services to ensure compliance with organizational policies and to promote fair and open competition.

Procurement Services will provide guidance and feedback to End-Users to help develop a comprehensive and beneficial SOW. However, Procurement Services will not serve as the primary author of the SOW content. It is the End-User's responsibility to ensure the SOW accurately reflects the project's operational and technical needs.

Creating an Effective Scope of Work:
Below are the primary steps in creating a scope of work, each providing a general overview of the information that should be included in each section.

Step 1: Become Knowledgeable of the Project Requirements and Historical Context
- Conduct preliminary research to fully understand the services and/or goods required. The goal is to collect sufficient information to ensure a purposeful SOW.
- Meet with University stakeholders (project managers, department leads, etc.) to understand the needs and goals for the project.
- Identify key objectives and success criteria.
- Review existing documentation, such as prior contracts, feasibility studies, or regulatory requirements.

Step 2: Purpose & Background
- Describe the purpose and intent of the project.
- Describe the expectations and outcomes of a successful contract.
- Provide essential background information for suppliers to better understand the project goals and objectives (such as historical and/or anticipated needs of the University).
- Explain how the project supports the mission of the University.

Step 3: Scope of Work Requirements
- Detail all tasks, services, and/or deliverables required by the contractor.
- Project schedule and timeline. Identify any required deadlines or project timelines (*completion date, project phases, etc.*) that the contractor or service provider must meet.
- List any responsibilities of the University under the contract (such as providing blueprints, or providing working space, etc.).
- Include objective performance or quality standards for services and/or goods that can be monitored and enforced.
- Include any reporting or communication requirements, such as monthly or quarterly meetings.
- Specify any required training, and include the frequency and duration (such as once per year for three hours). Additionally, detail the method of delivery, whether online or in person on the University's campus, and include any instructor-led requirements.

Step 4: Technical Proposal
- Detail all submittals that the Bidder must provide as part of its proposal to allow for a successful evaluation.
- Specify if any additional items, such as certifications, degrees, or licenses, are required. This may also include compliance with industry standards.
- Include a recommended pricing model that details how the bidder will provide costs to complete the scope of work. This may include options such as lump-sum fees, hourly rates, material markup (cost plus), unit prices, schedule of rates, or percentage fees. The goal of the pricing structure is to account for all services.

Important Things to Consider When Drafting the Scope of Work Requirements

Review the SOW for completeness and consistency. An incomplete SOW can result in gaps in operational needs and/or missed deliverables, often leading to additional costs from contract amendments. It is important that the End-User fully understands all requirements to meet the University's needs and explicitly defines them in the SOW. The End-User should not assume that non-defined tasks are understood to be completed by the contractor. Lastly, ensure that the SOW is consistent throughout the entire document.

Use measurable and specific language. The End-User should define the SOW in a way that is objectively measurable, monitorable, and enforceable. Avoid using language such as "as directed" or "to be determined at a later time." The bidder should, after reading the SOW, fully understand all obligations and deliverables, without any ambiguity or open-ended terms.

The SOW must be written to encourage fair and open competition. The University cannot mandate (*except in very limited pre-approved circumstances*) that a contractor must use a specified brand name. However, the SOW may list a brand name as a basis of design (*to help the bidder put the project in context),* so long as the language allows for equivalents. Additionally, all specifications and requirements should be objective, non-restrictive, and impartial, not favoring any bidder or supplier. Overall, all qualified suppliers should have the same opportunity to compete equally.

Pricing model should be written in a meaningful and sensible manner. The pricing model should accomplish the following:
- Directly correspond to the scope of work, ensuring that there is a relationship between the proposed costs and the services and/or goods to be provided.
- Be structured in a way that allows proposals to be evaluated on an equal basis (suppliers should not be submitting their own pricing sheets).
- Capture all cost components (materials, labor, equipment, services, etc.) to successfully complete the full scope of work. Ensure that nothing is omitted that could, after contract award, later cause disputes over pricing or lead to change orders.

Certain words directly affect contractual obligations and contractor performance. In public procurement, it is important to choose the correct language, specifically for the following terms: Must/Shall & May/Should.
- Must/Shall: Create a mandatory requirement for the contractor or service provider.
- May/Should: Creates a preference, or discretionary item, not a requirement for the contractor or service provider.