

SCOPE OF WORK

There are no firm rules for the format or length of the Scope of Work. The best guideline is that the Scope of Work should contain enough information to encourage bids or proposals at a price and of the quality that are acceptable and beneficial to the City. The following is a suggested outline for the Scope of Work, as well as the information that may be included in each section. The **bold** items can be used as the header for each section.

- 1. Introduction and General Information.** Purpose or objective of the solicitation/project, history and background of the project, required contractor qualifications, calendar of events for the solicitation and award of contract;
- 2. Task Description.** Work to be done by the contractor. This will be used in subsequent negotiations to develop the final scope of work that is included in the agreement;
- 3. Constraints on the Contractor.** Worksite conditions, ordinances and security control. Include any known information that may be required by the contractor in submitting a suitable proposal;
- 4. Contractor Personnel Requirements.** Qualifications of key personnel, employee identification, additional personnel responsibilities. Resumes of key personnel may be requested;
- 5. Contractor Responsibilities.** Quality control program, service complaints, emergency assistance and work schedule;
- 6. City Responsibilities.** What the City will do or provide to the contractor. The list may include such things as providing geotechnical reports, previous studies and existing plans or drawings or a description of the work to be performed by the Fire Authority in conjunction with the work performed by the contractor such as plan checks or installation of data ports;
- 7. Evaluation of Contractor Performance.** Performance standards, evaluation forms, incentives and liquidated damages;
- 8. Reporting Requirements and Procedures.** Contractor's reporting schedule and responsibilities. Items included here may relate to task completion dates, timelines and milestones;
- 9. Special Conditions.** Payment procedures, insurance, bonds, alternative surety, contract extension and renewal;
- 10. Evaluation Criteria.** Evaluation of responses and the ranking of consultants; price must be weighted at least 25%.
- 11. Exhibits.** Technical reports, maps, drawings, schedules, photographs.

Statement of Work Outline

10 Key Areas to Write a Good SOW

County Departments should use this outline to develop clear and concise statements of work to fully describe the work to be performed, deliverables, and outcome expectations of any contracting effort. This outline is a guideline and should be adapted as necessary by each department to properly and fully define its' program needs. As this document is developed, the Department should consider the questions: What; When; and by Whom; to fully describe how the department will review/monitor the contractors' performance of the established SOW requirements after contract award (typically documented in a Contract Monitoring Plan). Asking these questions about post award review and monitoring often leads to more clarity of the Departments' needs and expectations of what should be included in the SOW

Topic Areas/Sections

1. **Description** of the effort ... what are we buying and is the context of the procurement
2. **Roles and Responsibilities** ... identify the parties involved in the contracting effort and responsibilities
3. **Performance Expectations and Deliverables** ... performance characteristics and what is required
4. **Period of Performance and Deliverable dates** ... Calendar dates; weeks or months after award
5. **Inspection & Acceptance** ... how will Department determine that services/effort was successfully completed
6. **Warranty of services/product** ... what is covered; for what duration; and what are remedies for correction
7. **Personnel and/or Staffing Requirements** ... key named staff; qualifications; background checks required, etc.
8. **Special Terms and Conditions of work requirement** ... equipment; locations; licenses; clearances
9. **Meetings** (if required) ... Who; When; Where; and What should be covered
10. **Other Notices required by Contractor** ... are there events and areas that the contractor needs to provide timely notice to the County and/or third parties

NOTE: Areas and topics need to be reviewed in consideration of other contract terms and conditions and documents (e.g. specification) included in the contract to ensure consistency.