

STATEMENTS OF WORK

I. **What is** a Statement/Scope of Work ("SOW")?

The SOW forms the **blue print** for services to be performed and the products to be delivered under a contract.

It answers questions relating to **what, why, who, why, how, where, when, measurement and how much.**

II. **What is NOT** a Statement/Scope of Work?

Attaching the **procurement document** (IFB/RFP) and **vendor proposal** as exhibits to the contract **does not create a SOW**. Although certain portions of one or both of these documents will contain elements which should be included in a SOW, the complete documents should not be attached to the contract.

Procurement documents contain information relating to the **procurement and vendor selection processes**. These processes are completed prior to the execution of the contract.

Procurement documents contain the **contract format** or **specified contract provisions** which must be used as or included in the final agreement. Including the format or the provisions as part of an exhibit is an unnecessary duplication which could cause confusion.

A Statement of Work is **not a selling document**. Many proposals contain information about the vendor's past performances, other clients, team spirit and high ideals. This information may be relevant to vendor selection, but it is not relevant to the performance of services and delivery of products. The following are some examples of statements that **do not belong** in a SOW.

Our offer goes far beyond systems and services. We offer strong project management focused squarely on providing access, transparency and information the agency needs to support its larger goals. Our general relationship approach is to deliver on the agency's vision and mission by supporting the agency's strategic goals.

We also empower employees through out the project organization, from functional unit heads to line staff, to surface issues and ideas for improvement from within the project group.

On average, we are involved in six to eight transactions annually. They are all large undertakings, and the largest to date occurred in 1998. This included in excess of 500,000 investor records, covering 44 entities and more than 400 private companies.

Including **too much** in a SOW can be **just as dangerous** as including **too little**. Multiple statements can be contradictory. Information or requirements buried in pages of unrelated information can be overlooked. Determining the location of specific information may require going through hundreds of pages. Central approvers may become grumpy.

III. **What format** should be used for a Statement/Scope of Work?

A SOW can take **differing forms**, depending on the information which will be presented. Narratives, outlines, charts and graphs all are acceptable forms for presenting information. A SOW can utilize one or a combination of these forms, so long as they answer questions relating to the **what, why, who, why, how, where, when, measurement** and **how much** of contract performance and delivery.

EXERCISE

The Department of Animal Husbandry, Predictive Services Division, has selected a Contractor to **conduct research** and **lead community meetings** with respect to attitudes towards the biological species resident in the State of Colorado.

The Contractor, Wetellem Likewe Findum, Inc., a Colorado corporation (the "Contractor"), has been engaged to conduct research, by **phone** and by **mail**, to establish the **attitudes held** by citizens in the State with respect to each species resident in the State. The Contractor will **compile** the research and **present** its finding to the State and at six (6) **community wide meetings** through out the State. The Contractor's obligations under the contract should be **completed by** the spring run-off next year.

The Contractor will receive \$100,000 for its services.

I. **TASKS**

- A. **CONDUCT** research to establish citizen attitudes towards resident species
- B. **LEAD** community meetings with respect to resident biological species
- C. **PRESENT** findings to State

II. **GENERAL QUESTIONS**

- 1. **WHAT**
- 2. **WHY**
- 3. **WHO**
- 4. **HOW**

5. **WHERE**
6. **WHEN**
7. **MEASUREMENT**
8. **HOW MUCH**

III. INFORMATION PROVIDED

A. Conduct research to establish attitudes of citizens of the State towards species resident in the State

1. **WHAT**
 - a. **contact citizens regarding resident species**
2. **WHY**
 - a. **identify attitudes towards resident species**
3. **WHO**
 - a. **Contractor**
4. **HOW**
 - a. **by phone**
 - b. **by mail**
5. **WHERE**
 - a. **State**
6. **WHEN**
 - a. **by spring run-off**
7. **MEASUREMENT**
 - a. **compilation**
 - b. **presentation**
8. **HOW MUCH**
 - a. **\$100,000**

B. Lead community meetings with respect to resident biological species

1. **WHAT**
 - a. **lead community six (6) meetings**
2. **WHY**
 - a. **present findings**
3. **WHO**
 - a. **Contractor**

4. HOW
5. WHERE
 - a. **State**
6. WHEN
 - a. **prior to spring run-off**
7. MEASUREMENT
 - a. **completion of six (6) meetings**
8. HOW MUCH
 - a. **\$100,000**

C. Present findings

1. WHAT
 - a. **present findings to State and community meetings**
2. WHY
 - a. **disseminate information**
3. WHO
 - a. **Contractor**
4. HOW
 - a. **community meetings**
 - b. **reports**
5. WHERE
 - a. **communities**
 - b. **State**
6. WHEN
 - a. **prior to spring run-off**
7. MEASUREMENT
 - a. **six (6) community meetings**
 - b. **presentation to State**
8. HOW MUCH
 - a. **\$100,000**