

SOW DEVELOPMENT CHECKLIST

Use the following principles when developing your SOW:

Incorporating Documents & Website Information:

When incorporating documents or information found on a website into the SOW, the following language must be used: “incorporated and made part of this SOW by reference.”

Links to Websites:

Documents - “The Contractor shall comply with the requirements stated in the *Quality Standards for Colorado School-Based Health Centers*. This document is incorporated and made part of this SOW by reference and is available on the following website www.schoolbasedhealthcenters.com.”

Webpage Content - “The Contractor shall comply with 2012 Poverty Guidelines when determining client eligibility. This information is located on the U.S. Department of Health and Human Services website <http://aspe.hhs.gov/poverty/12poverty.shtml> and incorporated and made part of this SOW by reference.”

If electronic documents will be updated during the contract or purchase order term, the following provision must be included, “The content of electronic documents located on CDPHE and non-CDPHE websites and information contained on CDPHE and non-CDPHE websites may be updated periodically during the contract term. CDPHE will notify the contractor of all updates. The Contractor shall comply with all updates.”

If the program does not plan to notify the contractor of updates and expects the contractor to monitor all documents and website content for changes, the following provision must be included: “The content of electronic documents located on CDPHE and non-CDPHE websites and information contained on CDPHE and non-CDPHE websites may be updated periodically during the contract term. The Contract shall monitor documents and website content for updates and comply with all updates.”

DO	DO NOT
<input type="checkbox"/> Use sentences that are declarative, simple and concise	<input type="checkbox"/> Do NOT leave room for ambiguity
<input type="checkbox"/> Use plain simple English. If acronyms or professional terms must be used, define them once in the SOW and include the term in the Definitions section of the SOW	<input type="checkbox"/> Do NOT use jargon, acronyms, buzz words or phrases that are specific to government, professions and/or industry.
<input type="checkbox"/> Use an active voice	<input type="checkbox"/> Do NOT use a passive voice
<input type="checkbox"/> Start sentences with “The Contractor shall...”	<input type="checkbox"/> Do NOT use the terms “will”, “must” or “should”
<input type="checkbox"/> Always use “will” when stating CDPHE activities or responsibilities. Rule: “the contractor shall; the Government will.”	<input type="checkbox"/> Do NOT state CDPHE “shall” do something
<input type="checkbox"/> State clear, factual, specific expectations	<input type="checkbox"/> Avoid using the following terms as these words imply the contractor has a choice: <ul style="list-style-type: none"> • “may” • “could” • "any" • "either" • "and/or"

	<input type="checkbox"/> Do NOT use the terms: <ul style="list-style-type: none"> • "...may include, but not limited to..." • "as necessary" • "common practice in the industry" • "as directed" • "subject to approval" • "etc"
<input type="checkbox"/> Repeat the noun throughout the SOW to avoid any misinterpretation	<input type="checkbox"/> Do NOT use pronouns (her, him, them, me, it, and she)
<input type="checkbox"/> Use the contractor's signature on a contract as agreement to the content of the SOW.	<input type="checkbox"/> Do NOT use unnecessary phrases in the SOW such as "and the Contractor acknowledges and agrees..."
<input type="checkbox"/> Only provide content in the SOW related to the project	<input type="checkbox"/> Do NOT include information that is already stated in the General or Additional Provisions <input type="checkbox"/> Do NOT provide details about contract monitoring. Standardized provisions for monitoring and resolution of noncompliance are in the SOW template.
<input type="checkbox"/> If you use the terms "cooperate" or "collaborate", clearly define what the contractor is to cooperate with or whom he is to collaborate with and the reasons behind the requirement.	<input type="checkbox"/> Do NOT identify coalitions, committees, advisory councils or other community organizations as "partners" or use the word "partnership". The words "partner" or "partnership" indicate a <i>legal liability</i> and should not be used.
<input type="checkbox"/> Identify a specific agency or individual title or role that is contractually obligated to complete the deliverable.	<input type="checkbox"/> Do NOT list community "partners" as the "responsible party" for completing activities listed in the SOW
<input type="checkbox"/> List all requirements/deliverables separately, even if the time line for completion and/or personnel is the same	
<input type="checkbox"/> Be consistent with terminology throughout the SOW. Chose how to reference names and maintain consistency with words, terminology and phrases.	<input type="checkbox"/> Example: CDPHE staff should not be referred to as "Division staff", "Program staff", "Department staff" and "CDPHE staff".
<input type="checkbox"/> Use the approved SOW template as provided, changing only those fields indicated	<input type="checkbox"/> Do NOT change anything in black text in the SOW template. This is a standard PCU template and PCU will not sign the contract if the template has been modified.
<input type="checkbox"/> Negotiate the SOW and budget after a solicitation	<input type="checkbox"/> Do NOT copy a contractor's proposal or application response from a solicitation into a CDPHE SOW template or attach a copy of the proposal to the template.
<input type="checkbox"/> Express all activities and deliverables in measurable terms, such as quantities or quality to help you to evaluate or monitor the SOW. Example: "By August 30, 2012, the contractor shall recruit a minimum of 85 organizations serving schools or youth through community programs to implement the XYZ program."	<input type="checkbox"/> Leave any activity undefined and/or un-measurable. Example: "work with school-based and youth organizations to implement the XYZ program"

<p>“The Contractor shall attend a meeting on August 1, 2012 from 9:00am-11:00am with CDPHE staff. The meeting will be held at the contractor’s place of business. The purpose of the meeting is to review the first draft of revisions to the existing XYZ provider training curriculum and materials in accordance with the XYZ’s Provider Toolkit located at www.XYZtoolkit.org.”</p>	<p>“The contractor shall attend a meeting with CDPHE staff in the first quarter to review training materials”</p>
<p><input type="checkbox"/> Include standards [from the program, funding source, industry, regulation] when applicable. Example:</p> <p>“Selected Bidder(s) will submit one electronic copy to the project manager and one hard copy of the ‘All Appropriate Inquiry (AAI) Report’ to the OPS within 30 days of completing fieldwork. Bidder shall refer to ASTM 1527-05 “Phase 1 Environmental Site Assessment Process” for the content and format of this report.”</p> <p>Provide details on how funding requirements govern the performance of activities as appropriate.</p>	<p><input type="checkbox"/> Do NOT state that specific standards must be used to meet an activity/deliverable without providing a reference to a document or link to where the standards can be found.</p> <p>Reference the “ Incorporating Documents & Website Information” guidance on the previous page</p>
<p><input type="checkbox"/> Be as specific as possible. Identify:</p> <ul style="list-style-type: none"> • HOW activities should be conducted (approach, program, methodology). State if CDPHE staff need to approve the approach, methodology, etc prior to the delivery of services. • Location(s) for where activity(ies) are to be performed (clinic, specific city/county, school district) • Specific equipment requirements or standards • Specific number of individuals needed to perform the activity if possible (this impacts cost). • Whether the vendor can deviate from the expectations in anyway and define this as a percentage of variance 	<p><input type="checkbox"/> Do NOT leave room for ambiguity</p>
<p><input type="checkbox"/> Address transfer of ownership of data, equipment, media, intellectual property, and software licenses.</p>	<p><input type="checkbox"/> Do NOT enable the vendor to keep rights to ownership of data, equipment, etc. that is purchased on behalf of the State</p>
<p><input type="checkbox"/> Number each deliverable and activity within the deliverable table and ensure that numbering is sequential. List activities chronologically or in groups where activities are similar.</p>	<p><input type="checkbox"/> Do not list activities out of chronological order:</p> <p>“By August 20, 2013, contractor shall...” “By June 30, 2013, contractor shall...” “By October 31, 2013, contractor shall...”</p>
<p><input type="checkbox"/> Ensure that the budget matches all deliverables and activities listed.</p>	<p><input type="checkbox"/> Do NOT submit SOW and budget if the two documents do not align. All costs associated with the SOW deliverables, including personnel, travel, equipment, etc must be in the budget</p>
<p><input type="checkbox"/> Ensure that the budget is rounded to the nearest dollar</p>	<p><input type="checkbox"/> Do NOT include cents in the budget</p>