



WRITING EFFECTIVE STATEMENTS OF WORK

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SOW's are Exercises in Communication

Communication



Statements of Work are Exercises in Communication

- ▣ Communication with users
- ▣ Communication with vendors
- ▣ Communication to contract administrators

What is a Statement of Work?

A Statement of Work defines project specific activities, deliverables and timelines for vendors providing services to the client.

What is a Scope of Work?

A Scope of Work is included in the Statement of Work. It describes the specific tasks the vendor will perform to meet objectives. The Scope of Work list performance requirements, reference specifications, notices and drawings.



SOW Should Include Communication Among:

- ▣ Requestor
- ▣ Contracting Services
- ▣ Respondents
- ▣ Recipients of the Service
- ▣ Agreement Administrators



Who Reads Statements of Work?

- ▣ Buyers
- ▣ Sellers
- ▣ Sub-contractors
- ▣ Attorneys
- ▣ Judges
- ▣ Finance
- ▣ User clients



SOW and the Contract

- ▣ The statement of work is the heart of the contract. It generally prevails over the terms and conditions
- ▣ The terms and conditions should be reviewed so that they support the SOW



Purpose of a Statement of Work Cont'd

- ▣ Describes the work to be done by each party to the contract
- ▣ Describes what is expected and needed
- ▣ Is the guideline for contract enforcement
- ▣ Is used to resolve claims and disputes
- ▣ Provides for an accurate assessment of project progress
- ▣ Ensures that contract objectives are met



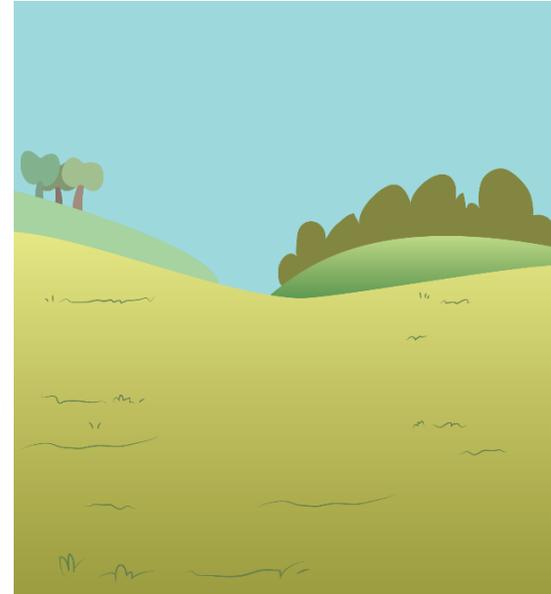
Things to include in the SOW

- ▣ Background information
- ▣ Mission statement
- ▣ Mutual responsibilities
- ▣ Minimum qualifications
- ▣ Description of work
- ▣ Deliverables
- ▣ Schedule
- ▣ Price, payment method
- ▣ Acceptance
- ▣ Constraints
- ▣ Risks
- ▣ Quality expectations



Background Information

- ❑ Can be important because it gives additional information that could be critical for a contractor to determine if it is capable of performing the work



Schedule

An SOW should specify, for instance, that the end user requirements are due two months after the contract is signed--- wording that still gets the project moving forward while accommodating potential problems such as delay in signing the contract.



Qualifications

Offerors must submit a statement of relevant experience. The documentation submitted must thoroughly describe how services have been supplied for similar contracts as the one being offered through this solicitation.



Acceptance

The purpose of this provision is to ensure that the product or service is in accordance with the contract requirements



Some Acceptance Provisions

- ▣ buyer shall perform benchmark testing to test for certain characteristics prior to installation”
- ▣ “during a sixty (60) day period following benchmark certification, buyer shall operate equipment in accordance with its normal operating practices to determine conformity and reliability”



Identify Risks and Constraints

- ▣ Identify any risks that the contractor might run into, e.g. issues with site conditions “soil may be soft in spots with sinkholes.”
- ▣ Identify any constraints that might hamper the contractor, e.g. “the working hours are limited to 9 AM to 3 PM
- ▣ Identifying risk and constraints can help with liability issues
- ▣ Describe quality expectations
- ▣ Determine how deliverables will be monitored



The Work Statement Team

- ▣ Must come up with a scope statement
- ▣ Must determine what is involved in that scope
- ▣ Must assign roles and responsibilities
- ▣ Must come up with a project plan and schedule



Market Research

- ▣ Determine the availability of offerors to meet your needs
- ▣ Determine standard warranty terms
- ▣ Determine standard terms and conditions
- ▣ Determine typical market pricing
- ▣ Determine product reliability

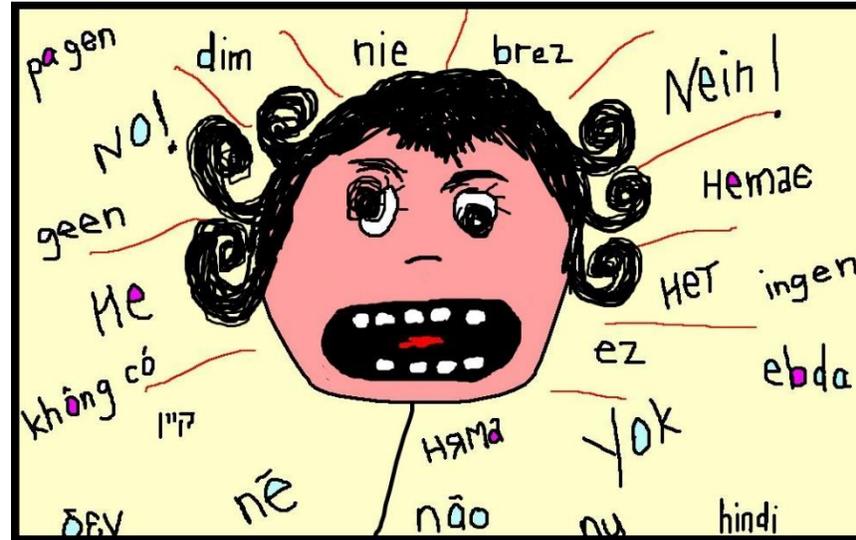


Steps to Preparing an SOW

- ▣ Establish preliminary scope statement
- ▣ List the tasks to be performed
- ▣ Group related and similar tasks together in a logical order
- ▣ Identify deliverables –particular those that are time sensitive
- ▣ Describe quality expectations
- ▣ Determine how deliverables will be monitored



Language is Critical



Readers should be able to understand the requirements without having to interpret, extrapolate, or otherwise guess at the SOW's meaning.



- ▣ A successful scope statement should be concise and clear. It should be general in the description of process but specific in outcome.

For example, “the catalog will feature 100 products” is better than “the catalog will feature many products” or “The project will be completed within 6 months” is preferable to “The project will be completed over a period of time.”



You Choose

- ▣ Utilize 18 personnel to properly process receipts which should be done within 24 hours

Or

- ▣ Process receipts in accordance with all regulatory requirements



You Choose

- ▣ Contractor shall provide documentation such as cleaning frequency or quality control inspection sheets upon the request of the contracting officer

Or

- ▣ Contractor shall ensure sufficient quality measures are in place



Important Features of Good Technical Writing

- ▣ Clarity
- ▣ Descriptiveness
- ▣ Accuracy
- ▣ Correctness
- ▣ Format



Language Tips

- ▣ Minimize acronyms
- ▣ Minimize jargon
- ▣ Keep sentences short and simple
- ▣ Use an active voice
- ▣ Avoid ambiguous words and phrases
- ▣ Avoid imprecise words
- ▣ Be consistent use of terms
- ▣ Watch “should” “must” “may” etc.
- ▣ Watch “and/or”
- ▣ Pronouns can be ambiguous
- ▣ Plurals
- ▣ Do not repeat things in the contract
- ▣ Be careful with lists



Can You Identify These Acronyms and Abbreviations?

- ▣ AARP
- ▣ MOU
- ▣ COLA
- ▣ FEMA
- ▣ CORN
- ▣ DOCS
- ▣ CDBG
- ▣ FIRST
- ▣ LEA
- ▣ LUP
- ▣ EIR



Words to Avoid

- ▣ Facility – why not just say “jail, hospital, school, etc.”
- ▣ Finalize – what does it mean? Terminate? Put in to final form?
- ▣ Methodology – is it different than method?



Other Wording Tips

- ▣ Be careful with “as applicable,” “as required.” “as necessary”
- ▣ Avoid qualifying phrases “as approved by,” “to the satisfaction of,” “in so far as possible,”
- ▣ Avoid “best commercial practices,” “good workmanship,” “reasonable care.”
- ▣ Do not use “may include, but not limited to.”



- ▣ Use drawings, charts, pictures, graphs, if they lend clarity



Statement of Work

- ▣ **Know what you are trying to accomplish**
- ▣ Be thorough
- ▣ Be clear
- ▣ Put yourself in the seller's shoes



Know What Your Mission or Value Proposition is

Develop a mission statement or statement of objectives



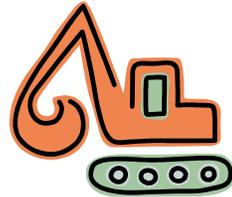
Know Your Purpose

A good scope statement will identify the reasons for the project



Life Cycle Cost/Total Cost of Ownership Looks at.....

The total cost of acquiring, operating, maintaining, supporting and disposing of an item



SOW Types

- ▣ Design –focuses on how the work will be performed
- ▣ Functional –describes function to be performed, performance requirements, or essential physical characteristics
- ▣ Performance- focuses on performance outcomes and how they will be measured
- ▣ Level of effort (time and material) –obtains contractors time and effort rather than an end product
- ▣ Combination – Includes elements from different kinds



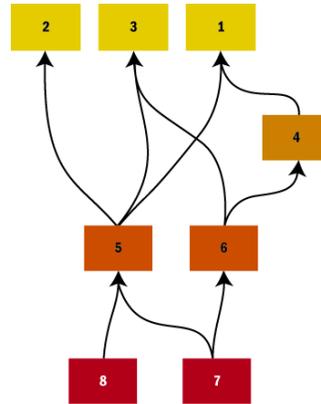
Performance Work Statement Questions

- ▣ Will constraints prevent efficient performance?
- ▣ Are commercial standards being utilized?
- ▣ Have quantity, quality, and timeliness been adequately addressed?
- ▣ Are performance objectives easy to measure?
- ▣ Will assessments be quantitative or qualitative?



Avoid Inappropriate Dependencies

Avoid statements or clauses that make contractor performance dependent upon your entity or on things you can't control.



Have Statements of Work Reviewed

- ▣ By those who will be impacted by it
- ▣ By those who must approve it
- ▣ By those with expertise
- ▣ By those who will carry it out



Thing to Consider When Writing SOW's



In Consulting Agreements

- ▣ Description of services
- ▣ Fees and expenses
- ▣ Standards of performance
- ▣ Ownership of data
- ▣ Warranties and remedies
- ▣ Non-disclosure
- ▣ Errors and omissions
- ▣ Licenses and permits



In Maintenance Agreements

- ▣ Equipment to be maintained
- ▣ Full description of the service
- ▣ Response times
- ▣ Price
- ▣ Warranties
- ▣ Buyer responsibilities
- ▣ Spare parts



Software License Agreements

- ▣ What are you permitted to do?
- ▣ Is the license irrevocable?
- ▣ What are the acceptance provisions?
- ▣ Is training included?
- ▣ Is maintenance included?
- ▣ What are termination rights?



Preparing for a Software License SOW

- ▣ Be clear on what you want and need
 - A list of issues or problems with the way you are currently performing a function or operation
 - The end-goal of the system or solution you seek
 - Detailed functionality and capabilities you need to achieve your end-goal of the system or solution you require



Include Performance Standards

- ▣ Develop performance standards or acceptance criteria expressed in:
 - quality
 - quantity
 - time
 - appearance
- ▣ Should include elements such as “what, when, where, and how many times
- ▣ Criteria should be appropriate contact and
- ▣ Necessary
- ▣ Realistic
- ▣ Objective and measurable



Make Performance Measures Tangible –See, Hear, Verify

- ▣ -floors must be free of all visible dirt and refuse
- ▣ -each wastebasket must contain a clear plastic liner and be empty of refuse
- ▣ -system availability shall be greater than or equal to 99.5%



Statement of Work Checklist

- ▣ Does the statement include only essentials?
- ▣ Has extraneous material been eliminated?
- ▣ Is the SOW sufficiently detailed to allow a vendor to estimate costs?
- ▣ Are mutual responsibilities clearly set out?
- ▣ Do all tasks contribute to the results?
- ▣ Have constraints been identified?
- ▣ Are outcomes measurable?

