

Developing a Clear Statement of Work & Statement of Requirement

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2026



Purpose

To Provide a Clear Understanding of the Basics of SOW/SOR



Process

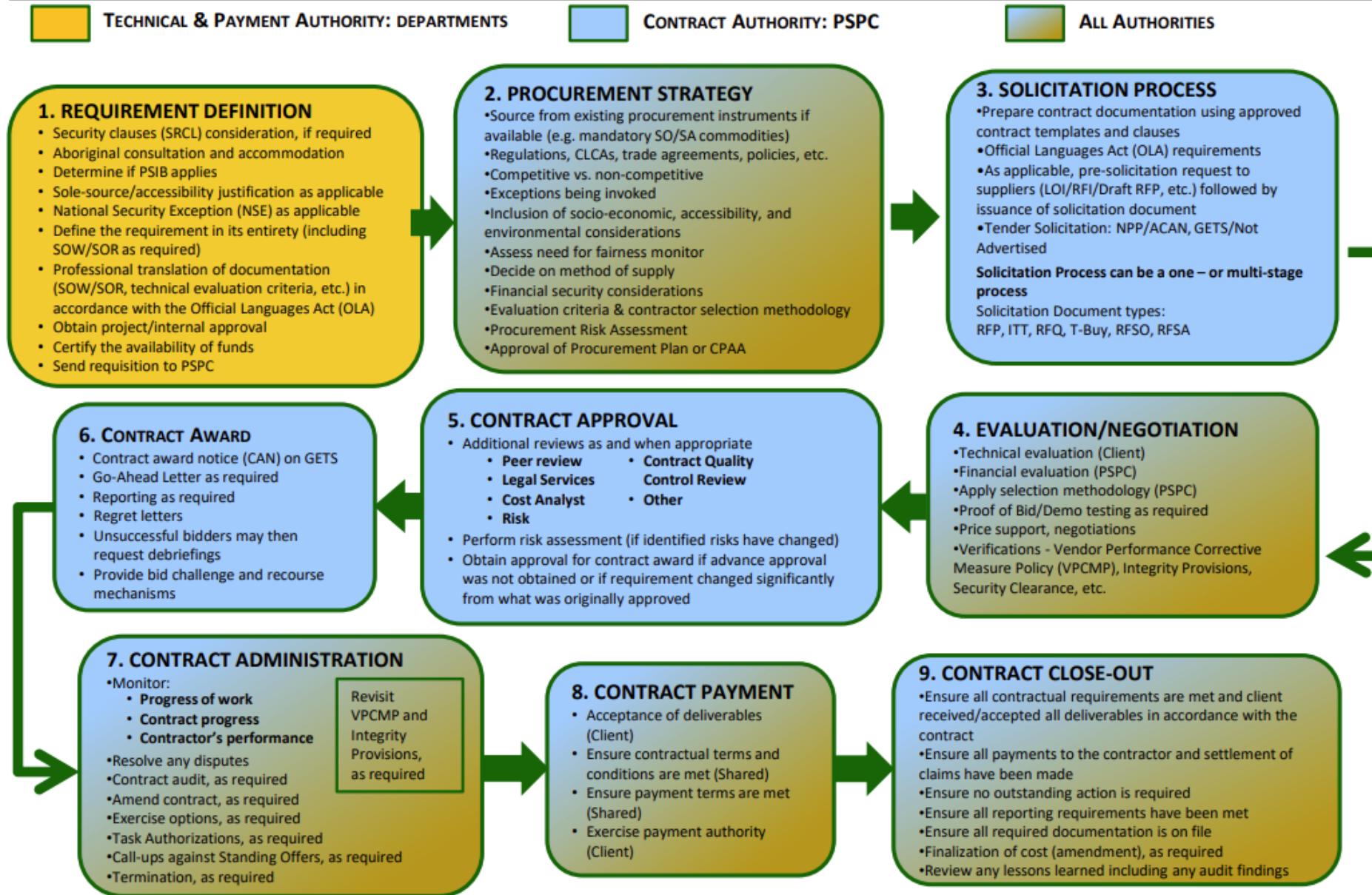
Learning through presentation slides, quizzes, examples, case studies, and Procurement Nugget.



Payoff

- Have a clear understanding of the core structure of a SOW/SOR
- Where to find resources.

PROCUREMENT PROCESS



| No. | Activities | Responsibility | |
|-----------------------------|--|----------------|-------|
| | | Client | PWGSC |
| 1 - Requirements Definition | | | |
| 1.1 | Define client's operational requirements: | | |
| 1.1.1 | Define essential characteristics (i.e., Statement of Requirements) | L | C |
| 1.1.2 | Consider all feasible solutions to meet client's operational needs | L | C |
| 1.1.3 | Develop preliminary project cost estimates and schedule | L | |
| 1.1.4 | Conduct cost benefit analysis of alternatives (including life cycle costing analysis) | L | C |
| 1.1.5 | Determine the total resource requirements and implications; for example, training, priority of allocation amongst operational needs and security requirements | L | |
| 1.1.6 | Obtain approval-in-principle to continue with project | L | |
| 1.1.7 | Develop Total Project Plan, including substantive cost estimates and schedules, special project management needs, project phasing, maintenance support requirements, etc. | L | |
| 1.2 | Define client's technical requirements: | | |
| 1.2.1 | Develop Statement of Work (SOW) and/or performance specifications or standards, including accessibility specifications or criteria, as appropriate, for the goods/services required in order to meet the operational needs. | L | |
| 1.2.2 | Define the technical requirements for accessibility, quality assurance, acceptance, warranty, training, documentation, packaging, transportation, initial provisioning, provide a signed Justification Form if accessibility criteria/considerations will not be included in requirement, etc. | L | |

Regular communication between PSPC (or Yourself) and the client is essential to success in all activities, even for those activities where no contributing role is indicated within the matrix.

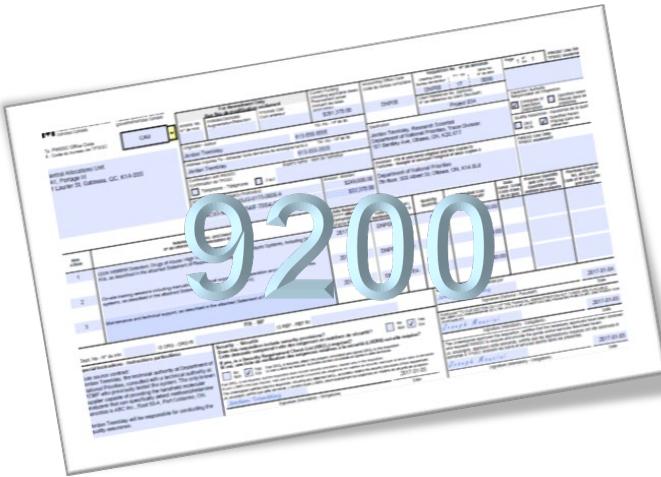


PROCUREMENT PROCESS

TECHNICAL & PAYMENT AUTHORITY: IN CLIEI

1. REQUIREMENT DEFINITION

- Security clauses (SRCL) consideration, if required
- Aboriginal consultation and accommodation
- Determine if PSAB set-aside
- Sole-source justification as applicable
- National Security Exception (NSE) as applicable
- Define the requirement in its entirety (including SOW/SOR as required)
- Translate documentation as applicable
- Obtain project/internal approval
- Certify the availability of funds
- Send requisition to PSPC



Requisition Number: DNP00-17-0099
 Document Version: 1
 Document Issue Date : 2017-01-05

ANNEX A Statement of Requirement For High Volume Air Sampling and Analysis Systems and Related Services

1.0 Background

To provide commercially available High Volume Air Sampling and Analysis Systems capable of analyzing vapours obtained from sampling marine cargo containers and detecting specific narcotics and explosives.

To provide training to border services officers on how to operate the system.

To provide equipment and resources to the High Volume Air Sampling and Analysis Systems.

1.1 Objective

The Department of National Priorities (DNP) continually works on new ways to protect the safety of all Canadians and facilitate the flow of goods in and out of Canada. Currently, the DNP uses detection technology to detect narcotics and explosives in goods entering and leaving Canada. Due to resource and budget constraints, the DNP prefers to use the latest scientific trace detection technology capable of detecting narcotics and explosives from sampling goods in marine cargo containers.

2.0 Requirements/Scope of Work

2.1 High Volume Air Sampling and Analysis Systems

The Contractor must provide six (6) commercially available High Volume Air Sampling and Analysis Systems that consist of a Detector System and a High Volume Sampler for delivery to DNP, Trace Division, 79 Bentley Ave, Ottawa, ON, K2E 0T7.

Each High Volume Air Sampling and Analysis System must be capable of analyzing vapours obtained from sampling marine cargo containers and detecting specific narcotics and explosives in accordance with the technical specifications specified herein. Each High Volume Sampler must enable border services officers to perform the sampling of cargo containers at existing openings and ventilation areas without the need to open the cargo containers.



ACCESSIBLE CANADA ACT

VISION PROACTIVELY ELIMINATE AND PREVENT BARRIERS AND ENSURE GREATER OPPORTUNITIES FOR PERSONS WITH DISABILITIES

MORE THAN 6 MILLION CANADIANS AGED 15 AND OVER HAVE A DISABILITY

LESS THAN 60% OF THOSE AGED 25 TO 64 YEARS HAVE JOBS

CANADIANS WITH MILD DISABILITIES EARN 12% LESS AND THOSE WITH MORE SEVERE DISABILITIES EARN 51% LESS
 AND THEY ARE MORE LIKELY TO LIVE IN POVERTY

"NOTHING ABOUT US WITHOUT US": The Accessible Canada Act will be implemented in partnership with persons with disabilities and the disability community.



Policy on Green Procurement

Buy Canadian



Indigenous Procurement



I. PRE-CONTRACTUAL PHASE

1. Define the requirement

2. Develop the procurement strategy

II. CONTRACTUAL PHASE

3. Solicit bids

4. Evaluate bids / Negotiate contract

5. Obtain contract approval

6. Award the contract

III. CONTRACT ADMINISTRATION PHASE

7. Administer the contract

8. Follow up on contract payment

IV. POST-CONTRACT ADMINISTRATION PHASE

9. Perform contract close-out

Procurement process phases and main tasks



Is your SOW/SOR Clear?



CLIENT: Why did you do it that way?

CONTRACTOR: Moving the Rock was not in the Scope of work.

SOW vs SOR what is the difference?



Statement of Requirement (SOR)



Competition is the Norm



What are the
5 Guiding
Principles ?

Competition

National
Objectives

Client Service

Equal
Treatment

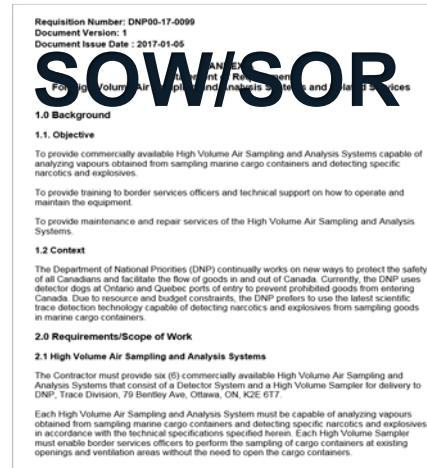
Accountability



Wants vs Operational Needs



VS





Performance based Specifications

Driving value through the Requirement



Trade Agreements



Legal Authority



**Why is it
Important to use
Performance
Based Specs?**



It Shifts the responsibility to the
CONTRACTOR to provide what
WE are looking for

Design vs Performance

Design specifications

- Prescribes what to do but not the end result
- Most often the part is well known and will successfully meet the requirement
- However, design specifications limits competition to a specific methodology and places additional risk to the Crown (ex: the part we ask for does not fulfill our requirement)

Performance Specifications

- Describes the requirement (end result) leaves the methodology up to the supplier
- The risk is with the supplier to ensure the end result is achieved
- Increase competition and potential savings for alternative methods not considered previously
- Ensures the end result will be achieved



Design Specification

DESIGN SPECIFICATIONS

- We need a Vision T9550 Treadmill
- Made of heavy Gauge Steel Welded
- Motor Control: Cambridge Works 3.0 HP
- Belt: Orthopedic Cushioned
- Product weight 260 lbs
- Rollers: Crowned with large O.D. Bearings.
- Motor: Control of Fuseless Limit
- Dimensions: 76" L x 33" W x 55" H
- Rubber coated steel wheels.
- Elastomer cushions placed strategically at front and back of deck to cushion for push offs at the back.



PERFORMANCE SPECIFICATIONS

DESIGN SPECIFICATIONS

- A specific product name from a brochure (Vision T9550) as per brochure



PERFORMANCE SPECIFICATIONS

- The Treadmill will be used for fitness testing, where the participant will be wearing a weighted backpack and be connected to our department's monitoring equipment. The treadmill must meet the following:
 - A minimum 3 HP continuous duty
 - Speed: 0/5 – 10 mph
 - 0 – 15% incline capability
 - 0 – 3% decline capability
 - User Weight: up to 500 lbs
 - Must be compatible with department's fitness assessment software current in operation.





Exercise

1. You have a requirement for a water bottle. Write down 3 DESIGN specs for this bottle of water
2. Write down 3 PERFORMANCE specs for your bottle of water

7 Key Elements – Performance Specifications



- Background of the Department
- Minimum Performance Specs
- Standards, Certifications, Regulations
- Software/hardware specification
- Technical support & warranty
- Delivery, inspection, installation, testing, Training
- Quality Assurance

1. Background

State the Name of the client organization acquiring the services or good and provide a brief summary of the department functions and mandate. Why is this needed? What is needed? When? Where?

1. Background of the department:

There has been a major transformation in the Department of Health & Fitness -Training Program. The goal of this Training and Physical Fitness Program is to provide DHF members to meet their operational requirements, to be able to perform under a wide range of geographical and environmental conditions, to cope with the stresses of sustained operations, and to be ready to respond on short notice.



2. What are the “Minimum Performance Specifications”?

The Specifications need to be:

- **Measurable(quantifiable)**
- **Based on NEEDS vs WANTS**
- **Based on Operation requirements vs “What is on brochure”**
- **Expressed in “ranges” or min/max**
- **Encourage Competition**
- **Verified during Evaluations**

Must be a maximum weight of 450 lbs

Must be able to tow a minimum of 150lbs

Must be able to fit in a space of 14” x 52” * make sure you account for opening of doors

What are the “General Specifications”

These specifications should address:

- What are the Dimensions
- Will they fit in the space (through doors)
- Are there weight restrictions (load bearing capacity of the floor)
- Any other restrictions with transportation, delivery or Installation?



1. General Requirements

1. All equipment destined for use within the DHF Regina Fitness Centre is intended for repetitive every day use, minimum 20 times daily , and must meet the following requirements:

1. Must be new. Refurbished or trade show products are not acceptable.
2. Must be heavy duty commercial grade.
3. Must be able to support at minimum 300 lbs and be compatible with people ranging in height from 4'10" tall to 6'10" tall.
4. One copy of the operating manual must be provided for each piece of equipment. Manual must be in the English Language. Electronic copy is acceptable.



3. What are the Standards, Certifications, Regulations

EU



US



AU



UK



- **Questions to ask the client:**

- ✓ Where is the equipment being plugged into? You need to clearly identify your requirement, especially with the possibility of manufacturers outside of North America with different standards. You need to be clear about the type of documentation that is required.
- ✓ Any Quality Assurance standards that need to be met? (ISO9001)
- ✓ Any Environmental standards? (ISO14001)





4. Are there Software Specifications?

- Is there software or hardware included:
 - What type of functionality?
 - ‘User Friendly’ needs to be defined
 - Is there Compatibility with existing software and hardware?

DILBERT by Scott Adams

YOUR USER REQUIRE-
MENTS INCLUDE FOUR
HUNDRED FEATURES.



scottadams@aoi.com

DO YOU REALIZE THAT
NO HUMAN WOULD BE
ABLE TO USE A PRODUCT
WITH THAT LEVEL OF
COMPLEXITY?

www.dilbert.com



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GOOD POINT.
I'D BETTER ADD
"EASY TO USE"
TO THE LIST.



Technical Support and Warranty

Address the Following if applicable:

- What happens if the equipment breaks down during operations?
- What type of support do you need? Onsite/virtual? 24/7?
- Length of Warranty? Type of Warranty?
- Exchange of spare parts?
- What is an acceptable level of response time?
- Call Centre support?
- Technical Manual? Videos? Online?
- Both official languages?



6. Delivery, Inspection, Installation, Testing & Training

After equipment is delivered then what?

- Does the equipment need to be unpacked? Brought inside the building or to the loading dock?
- Who is doing the installation?
- Who will test the equipment to ensure it is working?
- Who from the client department is the inspections authority?
- If equipment delivery is on March 31st, when does installation need to be done?
- Do employees need to be trained on the equipment? What type of training ? Video/in-person? Length? Completed by?

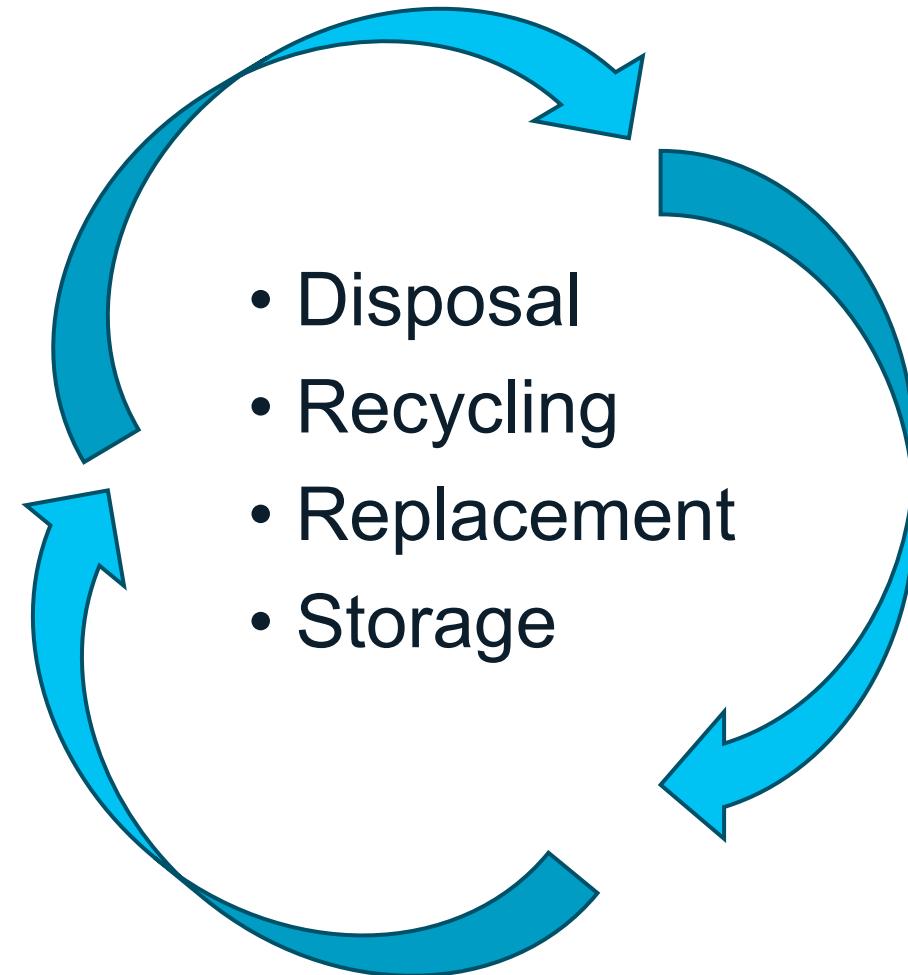


Quality Assurance

How do we address the quality of the supplier?

- Supplier must be an Authorized Value Reseller of the equipment they are offering.
- Should the manufacturer have an International Standard to ensure consistency of manufacturer of the product?
- Be very clear if the vendor will be responsible for providing a ‘turn-key’ system which will include installation, testing and commissioning.
- Equipment offered must be ‘new’ and not a ‘demo’ unit

Lifecycle





Other Factors to Consider and Include:

Accessibility
Green
Indigenous Suppliers
Buy Canadian
Options to Purchase



What is the Value?



BIDDER/CONTRACTOR:

- Clear & Concise direction to all bidders on what is expected and how to submit the information
- Flexibility

CLIENT:

- A more Organized submission from the bidders, results in an easier time conducting the Technical Evaluations
- Increased Accuracy of evaluations
- Improved time lines of the Evaluation Process.

PROCUREMENT OFFICER:

- Ease of verifying the validity of the information submitted by the bidder
- Ease of verifying the validity of the technical evaluations completed by the client department
- Improved time lines of the procurement Cycle

Exercise



BREAK



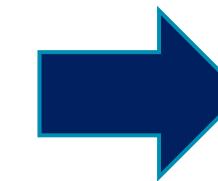
STATEMENT OF WORK



| |
|--|
| <p>STATEMENT OF WORK</p> <p>Accommodation Requirements for Royal Canadian Mounted Police Dog Service Training Centre</p> <p>This requirement is for commercial accommodation for participants attending training at the RCMP Police Dog Service Training Centre in <u>Innisfail</u>, Alberta. The Project Authority must be allowed to view the property and rooms being offered at any time during the period of the contract, to inspect the facility and ensure it is suitable, and that the requirements continue to be met.</p> <p>Accommodations must include the following:</p> <p>Property must Essentials (mandatory):</p> <ul style="list-style-type: none">- be located within 45 kilometers of the Police Dog Service Training Centre in <u>Innisfail</u>, AB- have a minimum Canada Select Star Rating of three (3) stars or CAA / AAA Diamond Rating of three (3) diamonds or greater- designated as an extended stay property- have a fully equipped kitchen that consists of a 2 burner cooktop, dishwasher, fridge with freezer (minimum size 11 cubic foot), full size microwave (minimum size 1.6 cubic foot), garbage disposal, smallappliances (e.g. toaster, kettle, coffee maker) cutlery, dinnerware, cookware and utensils- have a hot tub or whirlpool or sauna- have a front desk staffed 24 hours per day, 7 days per week- have maintenance available on request- have on-site overnight Security patrolling the hotel floors and parking lot to ensure safety of property and guests- require large parking lot with ample stalls and outlets providing complimentary parking for regular and oversized vehicles <p>Amenities (point rated technical criteria):</p> <ol style="list-style-type: none">1. On-site fitness facilities with ceiling over 6', high efficiency ventilation, rubberized safety flooring and filtered water refill station with a selection of workout equipment that include but not limited to treadmill(s), elliptical(s), recumbent bicycle(s), free weights and benches.2. Complimentary breakfast offering a selection of cold items that include but not limited to cereals, yogurt, hard boiled eggs, whole fruit and a selection of hot items that include but not limited to eggs (various styles), sausage or ham patties, oatmeal and various toppings, various breads or bagels and a selection of sweet breads.3. Property located in low traffic area4. On-site laundry facilities that include a minimum of 2 washing machines and 2 dryers.5. Enrolled in the Canada Green Key, Green Leaf Eco-Rating Program or <u>LightStay</u> Program. Environmental friendly practices/policies such as guests are given the option to reuse linens and towels instead of having them replaced daily and various recycling. |
|--|



Services Procurement



Requisition Number: 000700-07-0000
Document Version: 1
Document Issue Date: 2021-01-01

ANSWER A

1.0 High

1.1 Background

1.1.1 Objective

To provide cleaning, maintenance, repair, and support services for snow removal equipment and related equipment.

To provide maintenance and repair services of the High-Volume Air Sampling and Analysis Systems.

1.1.2 Context

The Department of Natural Resources (DNR) continually works on new ways to protect the safety of all Canadians and facilitate the flow of goods in and out of Canada. Currently, the DNR uses different ships and planes and truck routes of entry to prevent prohibited goods from entering Canada. Due to increases and budget constraints, the DNR prefers to use the latter to reduce their detection technology capacity of detecting narcotics and explosives from smuggling goods in container cargo containers.

2.0 Requirements/Scope of Work

2.1 High-Volume Air Sampling and Analysis Systems

One Contractor must possess one (1) commercially available High-Volume Air Sampling and Analysis Systems that consist of a Contractor Systems and a High-Volume Sampler for delivery to DNR, 100 Bremner Ave., Ottawa, ON K2B 5H2.

Each High-Volume Air Sampling and Analysis Systems must be capable of detecting explosives and narcotics from smuggling containers using a combination and detection of the x-ray and explosives detection with the inclusion of specific explosive detection sensors. Each High-Volume Sampler must enable border services officials to perform the sampling of cargo containers at existing screening and ventilation areas without the need to open the cargo containers.

SOW

Importance of a Clear SOW



Mutual Understanding

A clear SOW ensures all parties share a common understanding of project goals and tasks.

Scope and Performance Control

Well-defined SOW reduces scope creep and provides clear criteria for measuring performance and progress.

Accountability and Roles

Explicit role assignment in SOW enhances accountability and clarifies individual responsibilities.

Resource Planning and Legal Safeguards

A detailed SOW supports efficient resource planning and acts as a legal safeguard in contracts.

What is a SCOPE OF WORK



Getting a haircut..



Building blocks for a solid SOW

- Title
- Introduction
- Background
- Objective
- Scope
- Tasks/Requirement
- Deliverables
- Constraints
- Language of Work
- Security Requirements
- Travel Requirements
- Applicable documents
- Government Furnished Equipment/Information
- Location of Work
- Terminology



PAWsome Inmate Mentorship Program



TITLE

The title should summarize the service or deliverables required.

Good Example:

Dog Trainer Professional to develop a Reintegration learning program for Inmates

Poor Example:

- Dog Trainer
- Canine Program
- Reintegration Services
- Mentorship Program



INTRODUCTION

Briefly describe what is Needed

1.0 Introduction:

Springfield Correctional Services has a requirement to assist inmates in changing their criminal behaviors and to enhance their potential for successful reintegration into the community.



BACKGROUND

Provide enough information for the bidder to understand:

Why the requirement exists

What has been done to date(previous work)

Any other background factors that may affect the project



2.0 Background:

The PAW-some Mentorship Program is intended to instruct inmates in Operant Conditioning, non-punitive dog training methods. Aversive methods will not be supported.

Through the training of dogs, the handlers learn responsibility, communication and self-discipline. The dogs themselves serve a therapeutic value to an often – vulnerable population

OBJECTIVE

What is to be achieved by the contract?

From a Government Perspective.



3.0 OBJECTIVE:

To provide vocational training to inmates by managing the delivery of the Pawsome Mentorship Program, thus assisting in the reduction of risk and supporting increased public safety.

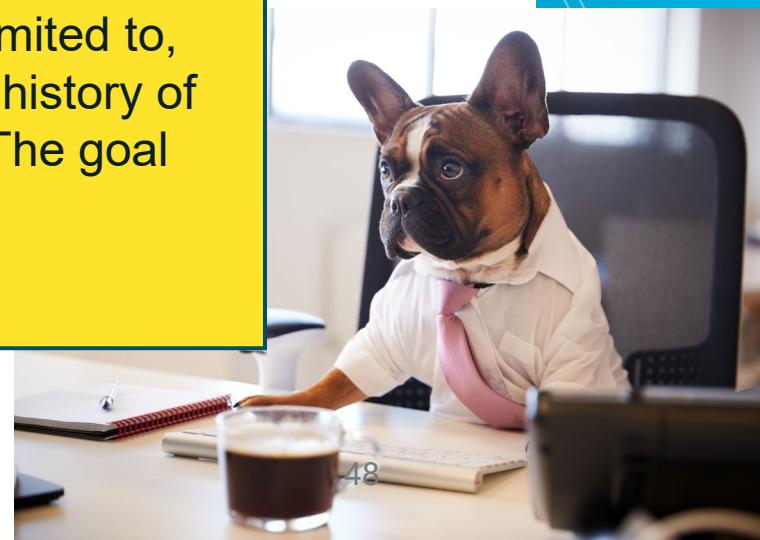
SCOPE

Details the High-Level areas of endeavor required to complete the work. It can also describe the goal of the project.

4.0 SCOPE:

The Pawsome program is a multi phased/level program designed to introduce participants to canine husbandry techniques. Participants will put these techniques to use by caring for and training a dog; and if they excel, produce a highly skilled assistance dog that may be placed with a disabled member of the community.

Beginning with an introductory level, the program shall include, but not be limited to, classroom instruction, demonstrations and hand-on practice in the areas of history of the dog, basic husbandry techniques, including health care and grooming. The goal will be to prepare each handler to care for and train their own dog.



Tasks



The “guts” of what you are asking the contractor to do. Tasks must be precise and clear.

5.0 TASKS:

- 5.1 The Contractor must be able to provide regular access to non- aggressive, suitable training dogs to be used in the Introductory training.
- 5.2 The Contractor shall select inmate handlers in collaboration with the Correctional Intervention Board
- 5.3 The Contractor must supervise inmates who are assigned to the program
- 5.4 The Contractor must present the handlers a combination of hand-on training, lectures, and videos and arrange for guest speakers.

Deliverables



Deliverables are tangible items (products, services, status reports that the contractor must submit during the project)

6. Deliverables:

The contractor must meet and deliver the following:

- 6.1 The contractor must complete attendance records of inmates and submit them on a weekly basis
- 6.2 The Contractor must prepare a report for each inmate handler at the end of the introductory portion of the program
- 6.3 The Contractor must present a certificate of completion to each handler upon successful completion of each module in the obedience training part of the program.

Constraints

If applicable, provide details of any imposed constraints that the bidder must consider.

(Government policies, standards, dates of events, type of equipment)

7 . Constraints

- 7.1 Contractor must comply with security regulations in place at the Institute
- 7.2 The Contractor's personnel will have access to confidential information, there for must comply with the Privacy act.



Language of the Work

Specify the language that the work will be performed and delivered in

8.0 Language of Work

8.1 Progress Meetings with the Project Authority will be in English. The Work to be performed must be conducted in both English and French. All Deliverable reports must be submitted in English.

Hello!

Bonjour!

Security

Does the Contractor have access to protected or classified government information or assets?

9.1 Security:

9.1 The Contractor's Personnel will have access to protected B Information



Travel & Living Expenses

Where does the Contractor have to travel to?

Location of worksites should be identified

10. Travel Requirements:

- 10.1 The Contractor will be required to travel to meetings at the Steering Committee's office locations a 100 Bark Avenue, Springfield, AB. The TBS Travel Directive will apply.



Applicable documents

List the applicable documents and a statement as to their order of presence must be included in the SOW. This includes any documents, drawings, specifications, samples or information which will be important to demonstrate how and when the work will need to be completed.

11. Applicable Documents:

- 11.1 Dog Kennel Standards Association of Alberta
Prevention of Animal Harm Association
Animal Health and Welfare Standards of Alberta.



Location of Work, Worksite and Delivery Point:

Identifies where the work is expected to be completed.

12. Location of Work

12.1 The Contractor must perform the work at the Alberta Institute 1939 Taylor Road, Springfield, AB, Building A & B.



Terminology

Terms specific to the operational environment may be unique and require additional explanation. If required, add glossary of acronyms and definitions.

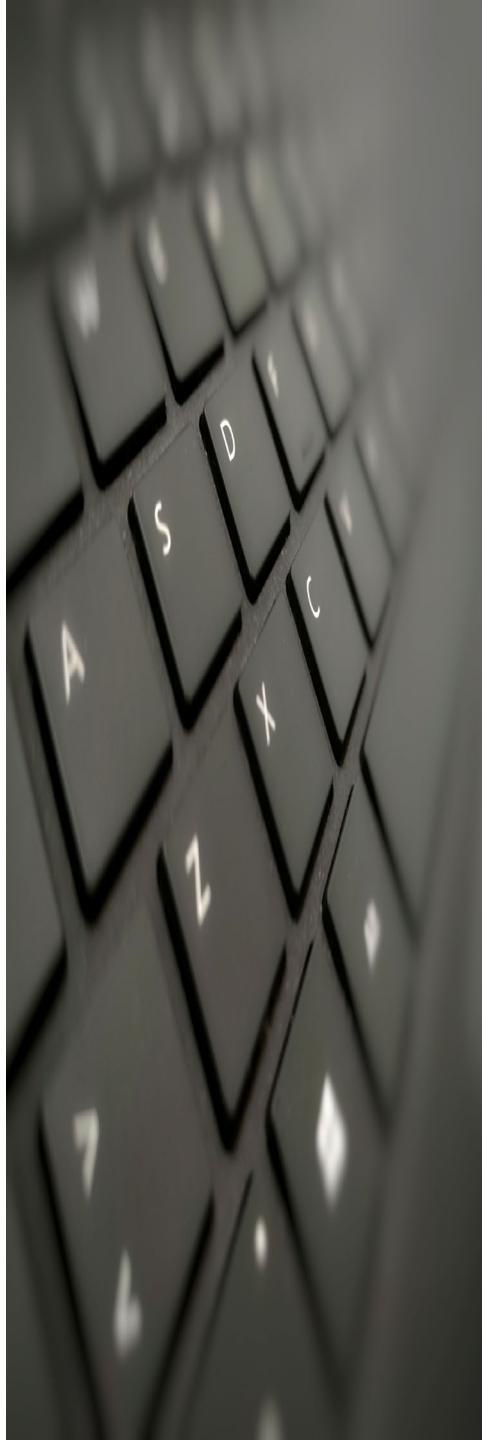
14. Terminology

14.1 SPCA- Society for the Prevention of Cruelty to Animals

ISR- Intern Status Report

PDP- PAWsome Mentorship Program

ASA- Animal Safety Associations

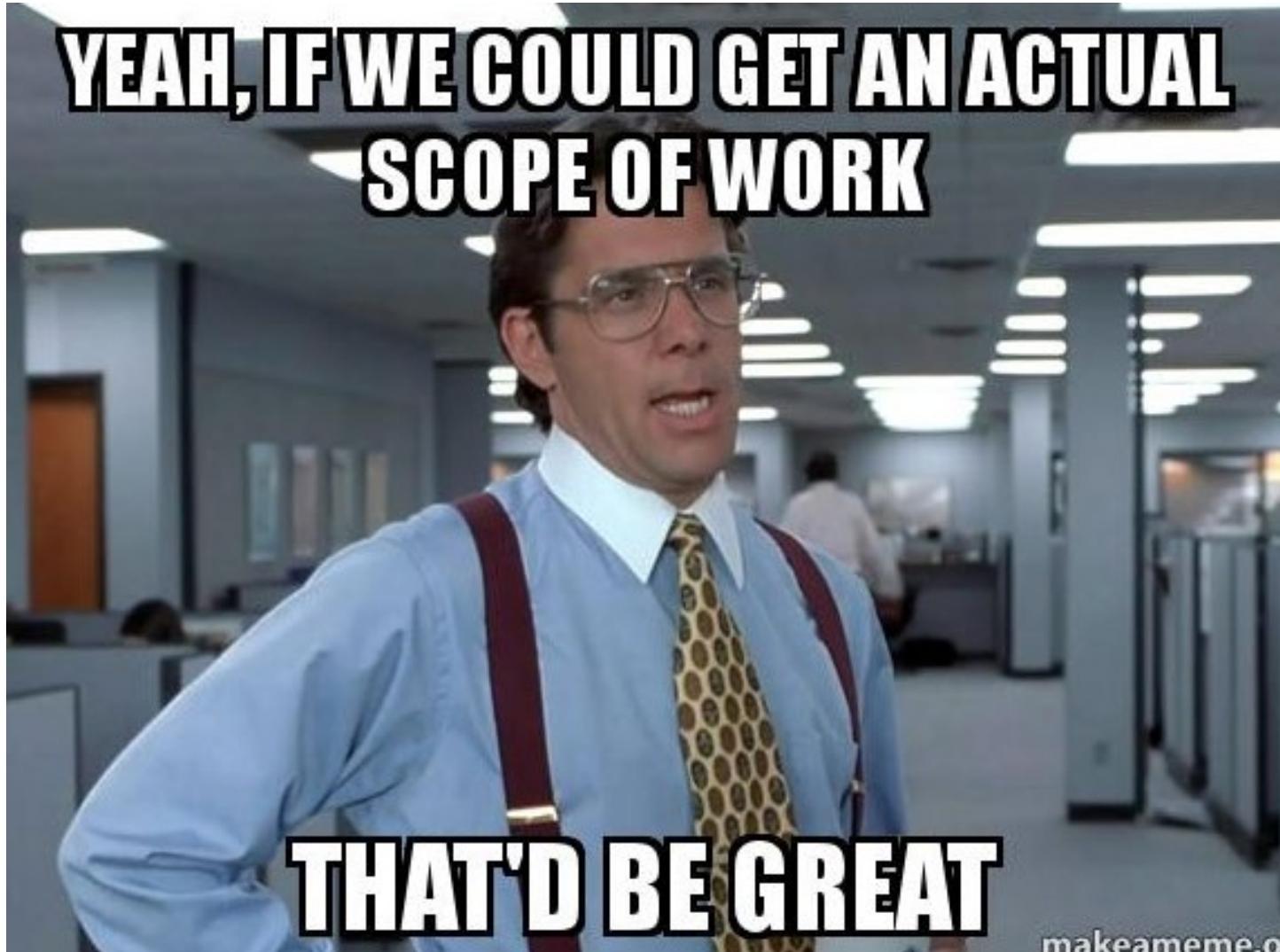


What's wrong with this picture?



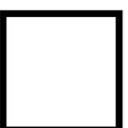
You are you be here from 8am to 4pm. I have a desk for you in Room 3A. Here is your password to access our network and a locker for your coat and supplies are on the 2nd floor.





When you get into a project without knowing the scope of work.. 😊👉

Best Practices for Writing an SOW



Clear and Concise Language

Use simple language to avoid ambiguity and ensure all stakeholders understand the document easily.

Measurable Deliverables

Define specific criteria for deliverables to enable objective progress assessment.

Acceptance Criteria

Include acceptance criteria to set clear standards for evaluating work outcomes.

Stakeholder Involvement and Review

Involve key stakeholders in drafting and thoroughly review the SOW before finalization.

Common Pitfalls to Avoid



Vague Task Descriptions

Unclear descriptions cause misunderstandings and scope creep among stakeholders.

Missing Timelines

Absence of deadlines creates uncertainty and hampers progress tracking.

Undefined Responsibilities

Lack of clear roles leads to confusion and duplicated efforts.

Overly Technical Jargon

Complex language alienates non-technical stakeholders and blocks collaboration.

Do Not Include:

Budgetary constraints

Costing Information

Information on the proposed basis of payment



SOW – Information not to include

- Sole source justification
- Proposed evaluation criteria, contractor selection method
- Milestone dates, unless mandatory
- Security or travel clauses
- Ownership of intellectual property rights
- Client organization contact name, phone numbers
- Budgetary constraints
- Costing information
- Information on the proposed basis of payment & payment schedule



EXERCISE



Where can I get help on SOW?

- Check Canada Buys for previous purchases
- Talk to PSPC
- Web Search
- SOW Checklists
- Gcpedia nuggets
- Client Engagement Officer



SOW Checklists


Canada School of Public Service
École de la fonction publique du Canada

LEARN NETWORK SUCCEED

Statement of Work Checklist

When reviewing a statement of work, ask yourself the following questions:

| Questions | Yes | No |
|--|--------------------------|--------------------------|
| 1. Do I understand what I am reading? Do I have a clear and complete understanding of the SOW? | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Does the SOW address the key components? | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Have the questions, who, why, what, where, when and how, been answered? | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. Are the binding requirements clearly distinguishable from the background information? | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. Are there any redundancies or inconsistencies? | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. Will the bidders be able to prepare a sound technical proposal? | <input type="checkbox"/> | <input type="checkbox"/> |
| 7. Are the tasks and deliverables (including the timelines) required realistic? | <input type="checkbox"/> | <input type="checkbox"/> |
| 8. Has the SOW been subject to independent review? | <input type="checkbox"/> | <input type="checkbox"/> |
| 9. Is the SOW free of: <ul style="list-style-type: none"> ▪ bid/offer evaluation factors? (These should be specified in a separate attachment to the solicitation) ▪ business management matters such as method and basis of payment that belong in other sections of the solicitation? ▪ pronouns with ambiguous antecedent? | <input type="checkbox"/> | <input type="checkbox"/> |
| 10. Is the SOW performance-based; that is: <ul style="list-style-type: none"> ▪ free of "how to" requirements? ▪ clear of statements that order or describe data items? ▪ free of requirements that cite chained government specifications or standards? | <input type="checkbox"/> | <input type="checkbox"/> |
| 11. Have all the relationships with other projects been considered and requirements integrated? | <input type="checkbox"/> | <input type="checkbox"/> |
| 12. Are there any references to other documentation? If yes, are they properly described and cited? | <input type="checkbox"/> | <input type="checkbox"/> |
| 13. Is the wording used to describe the work required in an active voice? Remember that the SOW will form part of any resulting contract. | <input type="checkbox"/> | <input type="checkbox"/> |
| 14. Is there a need for a glossary to describe acronyms and the definitions of frequently-used terms? | <input type="checkbox"/> | <input type="checkbox"/> |

Statement of Work at a glance...

PURPOSE OF A STATEMENT OF WORK (SOW)

- A legally binding, formal document that defines, in clear, understandable and quantifiable terms, the work to be performed or services to be provided under the contract. The SOW is included in the solicitation package and is included as an appendix to the resultant contract.
- Describes tasks, the methodologies to be used, and sets forth the period of performance.
- Allows potential bidders to understand the operational requirement and accurately determine their ability to fulfill the requirement and costing.
- Forms the basis for evaluating technical compliance during the bid evaluation phase, and measuring contractor performance during the contract management phase.

QUALITIES OF AN EFFECTIVE SOW

- Provides a clear and precise definition of the operational requirement and all deliverables – thereby increasing the likelihood of responsive bids.
- Establishes all technical requirements.
- Identifies the skills and qualifications required to perform the work.
- Provides criteria by which deliverables will be accepted.
- Establishes performance standards.
- Establishes milestones.
- Provides background information on the project, mandate, department, etc.

OTHER FACTORS TO CONSIDER

As applicable, the Client/Technical Authority must also address the following when developing the SOW:

- Procurement Strategy for Aboriginal Business
- Comprehensive Land Claims Agreements
- Security Requirements
- Intellectual property/copyright
- Green procurement
- Any other factors affecting the operational requirement

The contracting officer will also include the above in the solicitation and/or contractual documents as appropriate.

ADDITIONAL INFORMATION

- [Statement of Work Guide](#)
- [Treasury Board Communications Policy of the Government of Canada](#)
- [Plain Language Guide \(upcoming\)](#)
- [Defining the Requirement \(Supply Manual section 2.1\)](#)

THE KEY ELEMENTS OF A SOW
include, but are not limited to:

| | |
|--|------------------------------|
| SCOPE / OBJECTIVE / BACKGROUND INFORMATION | GLOSSARY |
| REFERENCE DOCUMENTS | MANDATORY REQUIREMENTS |
| NON-MANDATORY (DESIRABLE) REQUIREMENTS | WORK / TASKS TO BE PERFORMED |
| DELIVERABLES | ACCEPTANCE CRITERIA |
| DELIVERY LOCATION(S) | CONSTRAINTS |
| ANY GOVERNMENT FURNISHED EQUIPMENT OR MATERIAL | TIMEFRAMES |

WRITING A SOW

- The SOW should be sufficiently detailed to fully describe the essential requirements while leaving the bidders with the flexibility to propose their own strategies. Do not be overly prescriptive.
- Write in an active voice using present tense.
- Mandatory requirements must be defined using the word "must".
- Requirements which will be point rated in the bid evaluation must be defined using the word "should".
- Use generic, non-proprietary terminology.
- Avoid ambiguous language that can be misinterpreted.
- Number paragraphs/actions for easy reference.
- Avoid repetitiveness.

PLAIN LANGUAGE TERMINOLOGY

Plain language terminology involves communicating in a way that is clear, concise, unambiguous and consistent with other best practices appropriate to the subject or intended audience. It utilizes straightforward vocabulary and sentence structures. Plain language strives to be easy to read, understand and use. Some common examples:

- Instead of "shall" or "is responsible for", use "must".
- Instead of "Minister" or "Crown", use "Canada".
- Instead of "procurement officer" or "acquisitions officer", use "contracting officer" or "contracting authority" as appropriate.
- Instead of "supplier", "bidder", or "vendor", use "contractor".

Numerical values should not be written out numerically and alphabetically, e.g. "7 (seven)". This may cause inconsistency if one is changed and not the other. Numbers should be spelled out or written out in numerals, as the case may be.

Avoid jargon and unclear, ambiguous expressions that can be misinterpreted. For example, "roll-out", "stakeholder", "re-engineering", "align", "value added".

ROLES AND RESPONSIBILITIES

Client / Technical Authority (TA)

- Writes and finalizes the SOW
- Obtains internal approval
- Responsible for translation
- Uses information in SOW to align procurement strategy

PSPC

- Reviews SOW to ensure consistency amongst the various procurement documents and proposes revisions as necessary
- Provides internal approval
- Responsible for translation

As a best practise, the client/technical authority and the contracting officer should consult each other during the procurement planning phase to review the operational requirement, determine strategies and identify potential issues. (See section [1.45 Division of Responsibilities of the Supply Manual](#).)

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