

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/sections for easy reference.
- Avoid repetitiveness.

PLAIN LANGUAGE TERMINOLOGY

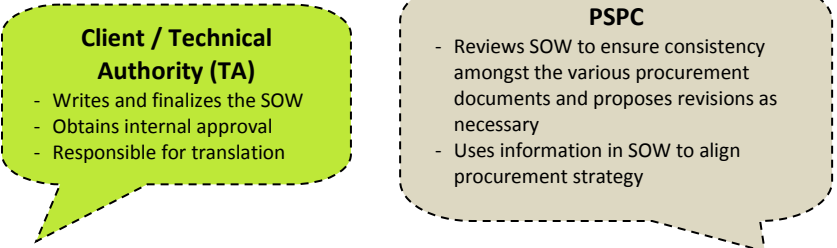
Plain language terminology involves communicating in a way that is clear, concise, unambiguous and consistent with other best practices appropriate to the subject or intended audience. It utilizes straightforward vocabulary and sentence structures. Plain language strives to be easy to read, understand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



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](#).)