**GUIDE FOR THE PREPARATION OF A STATEMENT OF WORK**

**INTRODUCTION:**

A Statement of Work (SOW) is used to describe the work to be performed by a contractor.

* The SOW is a stand-alone document that should be easy to read and understand.
* It must be explicit as to the requirements of the internal client and the responsibilities of the contractor, so that questions of interpretation can be avoided.
* The SOW must be prepared in sufficient detail to ensure that the internal client is later supplied with the services it requires.
* The author should avoid using words such as “shall”, “should”, “would”, “may be”, etc. so as to leave as little room for interpretation as possible.
* An inadequate (i.e. unclear, incomplete) SOW will plague any project and will force contractors and contract managers to take additional time and resources to clarify issues. This often leads to disputes, cost overruns, and time delays.

**FUNCTIONS OF THE SOW:**

**Taking the time to produce a well-written SOW helps in many ways to:**

* fully understand the nature of the project;
* identify hidden deliverables and services;
* uncover unclear or different expectations from users;
* foresee problems and identify preventative or contingent actions;
* better identify the skills and qualifications required to do the work;
* determine and weight the selection criteria;
* defend the bid evaluation strategy and the eventual choice of the contractor to contract review committees or unsuccessful bidders;
* receive better proposals from bidders, including better information to assess each bid; and
* convey a competent and efficient image to contractors.

**A well-written SOW provides potential bidders with the information they require to:**

* determine if they will bid on the contract, or not;
* more accurately cost the work both in quantity and quality requirements; and
* put together a quality proposal.

**KEY ELEMENTS OF A SOW:**

A SOW should include, but not necessarily be limited to, the following elements:

**Title:** In a few words, identify as clearly as possible what the requirement is about; as with a book, the title should get the picture across rapidly, give some idea of the goals of the contract in a short, clear, precise fashion. Do not use acronyms and try to limit "technical" jargon as much as possible.

**Background:** Outline the reasons for the contract, what led to it; describe the bigger picture of which the contract, even the project, is part. This could include a short description of the organization: its mission, historical background, culture, structure, etc.; and, as applicable, a summary of existing/impacting data, systems, and components (if technical and there are numerous, this can be put in annexes). Specify if there are any relevant existing documents available such as reports from previous studies and provide instructions to bidders on how and where to obtain copies of these documents.

**Objective(s):** Identify the objective(s) of the work clearly, with as little jargon as possible, describing what is to be achieved by the contract. This statement should also be suitable for use by PWGSC in publishing the requirement on the Government Electronic Tendering Service (GETS).

**Scope:** Describe, in general terms, the range, extent and boundaries of the work and the duration of the overall project. This section should outline to the prospective contractor exactly what work must be done, broken down into tasks. Identify all the tasks to be performed by the contractor to reach the stated objective(s). If the work is to be done in phases, indicate the required schedule for completion of each task and / or milestones which can be used in establishing a basis of payment.

The emphasis here should be on "what" is to be done, rather than on "how" to do it (the methodology is for the contractor to propose). This section should be very comprehensive as it is the guts of the SOW. Don't assume anything is obvious to the contractor.

**Travel:** Where applicable, provide as much information as possible regarding any necessary travel that will be required on the part of the selected contractor in order to perform the work.

**Meetings:** All meetings (progress meetings, acceptance meetings, demonstrations, etc.) involved should be clearly identified here in order to allow the contractor to prepare the travel portion of his/her cost proposal. Remember that if the contractor is required to visit any site, the cost of travel is included in the contract. If the Technical Authority (TA) is required to visit the contractor then the cost of the travel is borne by the department’s travel budget.

The SOW must clearly indicate the expected frequency and the location of any meetings and, in the case of acceptance meetings and demonstrations, specific target dates and locations for these events should be given, where possible.

**Reports and Deliverables:** Specify all the reports and other deliverables that are required (by task or phase of the work, as applicable), and state the required schedule and timeline (when) for completion and submission of each deliverable or milestone of the work as well as for the entire work. Describe the manner in which documents are to be presented, i.e. Number of copies of all final reports that are required and whether they should be bound or not, publication standards, in electronic format (specify what software), in hardcopy (specify number of copies required in each official language), etc. The approval and acceptance requirements for all deliverables must be clearly spelled out.

**Government Furnished Support/Equipment/Information:** It is extremely important to note all support or equipment that will be provided to assist the contractor. Provide details of any available client support (i.e. information, furnished equipment, tools, facilities, etc.) and clearly identify the client’s roles and responsibilities under any resulting contract.

**Special Considerations / Constraints:** This area may be used to identify any out of the ordinary circumstances that will affect the performance and delivery of the work. If the contractor will be working on site, consideration must be given to safety and security. It is also the responsibility of the TA to assure that the contractor has been briefed appropriately.

Provide details of any imposed constraints that the bidder must consider (i.e. factors that set parameters, limiting the bidder’s options or choices in the way the work can be carried out). These could include internal policies and standards, current and proposed related activities, set dates for certain events, security requirements, language requirements, distance considerations, sensitivity to other interests, considerations with respect to protection of the environment, conservation of resources and any other relevant restrictions such as the type of equipment required, the approach to be followed, etc.

**Acceptance Criteria:** How will the results of the contract be judged? What will define a successful contract? Put some thought into this "up front" so that if there is a problem with the work, it has been clearly defined at the outset what is "acceptable".

If there is a specific acceptance criteria (e.g.: # of analysis) put it in, or use one of the following: "The work will be monitored regularly for adherence to the work plan and to approve any modifications which may be required. Acceptance will be determined following examination, satisfactory completion and acceptance of the final report by the Technical authority." or "Acceptance of the work will be determined by the Technical authority following examination of the final report documenting all work performed."

**Level of Effort (if required):** In some circumstances, it may be necessary to indicate an estimated level of effort to carry out the work. For example, where services are required on an “as and when required” over a period of time, it is helpful to provide bidders with an estimate of the anticipated level of effort. In any such circumstances, the level of effort should be expressed in terms of person years or full time equivalents, with the onus on the bidder to determine the number of resources and level of effort per resources. A well-defined level of effort may help substantiate your case in the event of work not meeting the acceptance criteria noted above.