

Beaufort County School District
Procurement Office
Writing a Scope/Statement of Work (SOW)

The purchasing agency will prepare the sourcing document with input from the end using department and or technical specialist. A good statement of work (SOW) will outline specific services the contractor is expected to perform and should indicate the type, level, and quality of service. It is the key to the service contract and should be able to clearly communicate to requirements to the vendor community.

The Statement of Work or Scope of Work, predominately used in RFP's and RFQ's is defined as a "detailed description of the work which a purchasing agency wants the contractor to perform. Purchasing must be able to understand the requirements and be able to effectively communicate those requirements to potential offeror's. The proposed SOW must accurately reflect the specific work requirement, what needs or is intended to be accomplished, milestones, benchmarks, deliverable, performance measures, etc. It does not specify how the work is to be accomplished, personnel, or what equipment is to be used to perform work. It provides the purchasing agency with expected completion dates.

The quality of response will be reflected by the quality of information provided to bidders and proponents for response. The SOW should be composed in a manner that will maximize competition as well as afford bidders the ability to propose innovative and creative alternative solutions.

The following represents specific information that should be found in a Statement of Work:

- Introduction and Scope of Work/Project – Provide an overview of the depth and breadth of the project requirements. Bidders should be able to review this section and make a determination as to their interest in offering a bid, quote, or proposal.
- Nature and Description of the Project- List key elements of the project, work, or deliverables. Issues of duration, complexity, areas that impact the project or work, and any other aspects of the project that would assist the bidder in making a determination of whether or not to respond.
- Background- Provide any relevant information as to how the project or requirements were developed prior to the sourcing stage.
- Objectives and Purpose of Solicitation – Describe the purpose, objectives, and goals of BCSD and references the pertinent and subsequent information that will provide the scope of work, deliverables, expectations, and terms. Please provide information about the length of the contract and any potential extensions resulting from this award.
- Project Advisory Committee- Provide a list a persons responsible for developing and approving the technical and specialized requirement. Identify the evaluation criteria and ranking factors.
- Project Coordinator – Please indicate the specific individual charged with the responsibilities to coordinate, administer, advise, and collaborate with all participants involved in the solicitation and acquisition.

- **Project Team** – Indicate team members whose skills, knowledge, and experience are necessary to achieve the goals and objectives of the acquisition and implementation.
- **Project Scope of Work and Requirements Definition**- Indicate the scope of work, requirements definition, and deliverables for the solicitation document which must clearly reflect the deliverables and performance expectations of the vendor. A clear understanding of the work or product required and be able to define the requirements and respond to those requirements with a best value in such a way that will reflect achievement of the goals and objectives upon work completion.

General and Special Terms which may be used to detail the scope of work and level of responsibility required of the supplier in the performance of the contract. This is not a comprehensive list but merely a tool to assist in addressing the issues in the general and special terms and conditions.

Administrative Issues

Commencement of Work – specify the earliest date and time when the work is to commence. Specify restrictions prior to any issuance of a purchase order or contract and notice of commencement requirements.

Delay of Work – in the event a delay of work could occur or be expected you should illustrate the notification requirements, reason for delay, impact of the BCSD and projected completion date.

Hours of Work- if there are restrictions on the hours during which work will be able to be performed, specifics should be included. Because of such limitations, the bidder may have to adjust their pricing or completion date. Be sure to mention any weekend and statutory holiday restrictions. List any special considerations pertaining to schools.

After Hours Access- indicate afterhour's access restrictions or security clearance restrictions.

Security Clearance- identify any security restrictions in place and identify those constraints and explain the restrictions that may impact the bidder. Enumerate the conditions and any subsequent ramifications.

Notice of Substantial Completion- identify any requirement to obtain a certificate of completion prior to any final holdback release.

Change Orders- mandatory in the event there is change in the SOW and authorizes the Contractor to perform additional work not previously anticipated or included in the SOW. Provide provisions for Change Orders if they are anticipated.

Structural Integrity – Engineering Certification – identify all aspects of this requirement during the various stages where structural engineering certification by qualified and certified engineers is required.

Engineering Certification-if required during construction, the contractor should be instructed and required to retain professional registered engineering personnel and secure the required certificates to the BCSD; clarify the manner, nature, and frequency of inspection and prompt delivery of certificates to the BCSD.

Project Coordination-Specify the contractor's obligations for coordination of work, progress reports, project management, and update of schedules and specify the requirements for the contractor maintaining a copy of all specs, plans, addend, drawings, written instructions, and change orders on site.

Project Hand off Upon Completion-Explain the process upon notification of substantial completion of a project. Explain how BCSD and the contractor will visit the site and perform a final inspection to determine compliance with specifications and to document deficiencies requiring remedial repair or replacement and a plan to correct such deficiencies previously agreed upon with alternate time lines established for completion and responsibility for costs established.

Project Coordination Meetings- Define the requirements and responsibility of the project coordinator to include coordinating all project meetings, documenting deliberations, authorizing further work, and following up on progress and reporting.

Legal Issues

Permits and License-Identify all permits the bidder or proponent is required to obtain prior to, during, and after completion.

Temporary employment Authorization- identify the use of subcontractors and make it clear that the bidder is solely responsible for use of said subs. Identify documentation requirement for proposed use of out of the country resources and their responsibility for documentation of such.

Building and Development Permits-indicate the requirements of certain development and building permits to be issued

Work and Materials

Material Compliance- specify deliverables, the work to be performed, performance criteria, measurement, and require material compliance. Specify if any variations or substitutions are allowed.

Workmanship- Clearly document the responsibility, obligations, and consequences of incomplete, unsatisfactory, and defective work and/or materials including requirements for all workers to have the required skills, qualifications, and expertise associated with the work to be performed.

Repairs to Damage- indicate provisions for the obligations and responsibilities of the contractors that they are responsible for repairs and damages caused by their work force.

Installation and Removal-stipulate the conditions of the movement of material and works with the work site and the remedial repair to damage caused by the contractor and the timeline for them to execute work expeditiously and restore the building and site to its finished-state condition in a prompt manner.

Scrap and Salvage-indicate the provisions for the removal of scrap and the contractor's obligations for salvage materials and/or equipment. Indicate whether surplus or excess materials and any item suitable for reuse are to revert to BCSD.

Barricades-make provisions for erecting barricades at sites to protect the public, workers and property from inadvertent damage, noise, or worker error.

Dust-provide detailed information of a bidder's obligations and requirements to provide and install dust-tight screens or protective partitions to localize dust and particle residue. It should declare that the work site is to be maintained in a dust-free environment for the duration of the project.

Weight Load Requirements-specify or caution as to weight load limitations at the agency's workplace and make them aware of their obligation to take protective measures to minimize risk to buildings, property, and the public entity's workers.

Sanitary Facilities – indicate and clarify the availability of BCSD's sanitary facilities to the contractor's workers by specifying if the contractor is to provide its own and indicating the location and maintenance of it.

Lighting-specify any restrictions on the use of the BCSD's lighting during specified hours and if the contractor is required to provide their own portable power supply.

Communications/Telephones – clarify the availability and use of its telephone infrastructure and that all telecommunication requirements not provided by BCSD, including cell phone are the responsibility of the bidder.

Storage-Reference any provision providing and allocating storage for building materials, equipment, and construction accessories during construction, the location, access, and use and control of this area should clearly be reference. Provide a disclaimer for the responsibility for loss, damage, or theft of any items owned by the contractor.

Fire Protection-Define any obligations and responsibility that the contractor may have.

Security/Keys- indicate if keys are provided, the cost of replacement, rekeying of doors due to lost keys, etc, as well as indicating the requirement to abide by all security provisions of the BCSD's security policy.

Building Services-specify if the contractor should be required to maintain essential building services continuously and keep temporary interruptions to water, power, sewage, and other services to a minimum. Include any extenuating circumstances and conditions for clarity.

Report to Maintenance- identify provisions for worker access to the site. Include requirements to sign-in and maintain login sheets for the duration of the contract or work. The contractor should know at all time which workers are on site and their specific work locations in the event they have to be evacuated for the building site.

Support Structures-illustrate the contractor's requirement for the installation, maintenance, and removal of support structures such as scaffolding or bracing during construction.