**SCOPE OF WORK WORKSHEET**

This document provides guidelines and a structure to assist users in creating a more complete ‘Scope of Work’ document. The Scope of Work lays the foundation for success and has a direct impact on the project/service/product’s results.

A “good” or complete Scope of Work will give vendors the information they need in order to assemble a more complete and competitive proposal. It will tell vendors what you want and any problems or issues you are trying to solve. Without a complete Scope of Work, vendors will have to guess and make assumptions about what you need (which may not align with your goals and potentially result in cancelling the project), while others may choose not to propose at all.

On a “Top 10” industry list of reasons vendors gave for not proposing on RFPs, the #1 reason was that the scope of work did not explain what the user was trying to accomplish/solve & did not simply state what the user was expecting to get/desired state. In practice, too much focus on the details up front can lead to skipping of initial objectives and critical background information (or assuming that vendors will understand what you mean). What is sometimes perceived as obvious or unnecessary background information is very useful to vendors.

**Top Impacts of Poor Scope:**

* Decreased competition (fewer vendor proposals)
* Increased confusion & vendor questions/addenda
* Wide range in vendors’ cost proposals
* Dissatisfaction with end result (does not match expectations)

This document should be used to try and gather as much information as possible (within your constraints), to attract the highest performing vendors. Some of these questions may seem to overlap, but this is intentional to assure that the true intent and needs are captured. This Scope of Work Worksheet is divided into 5 different parts that should be completed in the following order:

Part 1 – Background Information

Part 2 – Satisfaction

Part 3 – Current Conditions

Part 4 – Desired Outcomes

Part 5 – Scope of Work

**PART #1 - BACKGROUND INFORMATION**

1. **OVERALL VISION (WHAT ARE YOU LOOKING TO PROCURE)?** In your own words, briefly explain the overall vision for this project… what are the main strategic objectives & overall outcomes that need to be achieved? In other words, what will make this project deemed to be a success? Try to describe at a high-level and avoid any technical language/abbreviations.

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1. **ANTICIPATED SPEND?** If you have a budget for this project/service/product, please identify what it is.

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| Do You Have an Anticipated Spend/Budget? |  | Yes | No |
| If “Yes”, What is Your Anticipated Spend/Budget? | $ |  |
| If “No,” what is your ESTIMATED Anticipated Spend? | $ |  |

1. **CRITICAL DATES?** Identify any special time requirements for this procurement (identify all that apply):

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| Date the procurement needs to be awarded by |  |
| Date that the project/service/system needs to be completed by |  |
| Date the current contract expires |  |

1. **OWNER’S PROJECT TEAM** Identify the project team (lead point of contact and critical stakeholders. Provide the role or job title for each)

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1. **CRITICAL INFORMATION?** Identify any other critical information that Procurement should be made aware of (if any).

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**PART #2 – SATISFACTION**

1. **BASELINE SATISFACTION (if applicable):** Identify your overall satisfaction (with the existing product, system, current provider, current level of service, etc. – even if managed internally). Rating is on a 1-10 scale (10 = extremely satisfied and 1 = extremely dissatisfied).

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| Current Satisfaction (1-10) |  |

1. **REASONS FOR DISSATISFACTION:** If you did not provide a rating of 8 or higher, please identify the greatest issues/challenges that you have encountered. In other words, identify the main reasons you are not satisfied with the current system (what are the most important things you’d like to change?) (bullet point list is fine)

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1. **KEY MEASUREMENTS OF SUCCESS:** What are the key metrics or indicators that will be used to determine if the new project/service/product is a success? Identify 3-5 metrics that can be easily quantified (consider cost/fee, satisfaction, quality, time, etc.). Think of how a ‘non-expert’ in this field will know whether this project/service/product was a success.

Describe the ideal outcome, operation, or performance that the Owner intends to achieve. In other words, what would the vendor have to deliver in order to receive a 10-out-of-10 satisfaction rating at the end of the contract term?

During and after the project, these key measurements will be used to evaluate project success and vendor performance.

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**PART #3 – CURRENT CONDITIONS**

Preparing a ‘perfect’ scope of work can be difficult and challenging. Providing vendors with details and information about the current conditions or environment can be essential for them in understanding what your true objectives are. This information can be just as useful as providing a great scope of work. Provide as much information about known conditions (as reasonably possible) so that the vendor can understand the current environment.

1. **LOCATION CONSIDERATIONS:**
2. Where is the project/service/product currently located?

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1. Will the replacement be located in the same location?

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1. Any issues/risks/concerns that you have or foresee with the future location?

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1. Anything that makes this location unique (that vendors may not be used too)?

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1. **RENEWAL SERVICES:**
2. Is this a ‘renewal’ of an existing service, or is there currently a service/product/system in place?

*[ ]* This is a renewal

*[ ]*  This is not a renewal, this is brand new

*[ ]*  This is not a renewal, but this is something we have done internally

1. How long has the service been in place?

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1. How many years has the current provider been in place (or has this been done internally)?

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1. Why is this being re-procured?

*[ ]*  Current contract is ending

*[ ]*  Unhappy with current service/product/system

*[ ]*  Looking for improvements

*[ ]*  Provide additional comments

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1. What major issues have you had with the existing/current service/product/system (are there any issues that you expect the new service/product/system to avoid or address)?

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1. What major issues have you had with the existing/current vendor?

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1. **CRITICAL DATA:**
2. What critical data do you have on the current service/system/product? Once again, this will help paint a picture of your current environment so the vendors know where you are at, and/or the minimum level of service expectations. Things to think about: volume of work, size, number of transactions, number of users, number of stakeholders, work orders, response times, reports, etc.

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1. What critical data are you missing (data you don’t have or won’t be able to get) that might be critical to the vendors?

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1. **BACKGROUND INFORMATION:**
2. Provide a summary of the current environment and operations:

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1. If applicable, provide a summary of the existing service (what it does, how it operates, the critical functions, how it impacts the organization, the stakeholders, people involved, critical key reporting, what people like about the current system, what the weaknesses and constraints are, etc.):

*(Think of this as “a day/week/month in the life of...” a current service provider, user, operator, etc.)*

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1. If applicable, provide a summary of the existing vendor (what they do, how they operate, the critical functions they perform, how their service impacts the organization, the stakeholders they are involved with, key reporting that they provide, strengths of the current service provider, weaknesses and constraints, etc.):

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1. **CONSTRAINTS:**
2. Identify any current constraints or issues that this project/service is facing.

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1. Is there anything that is different or unique about this project/service (that would make this more challenging for vendors)?

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1. Are there any future or related projects that may have an impact on this project/service?

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1. **“DAY IN THE LIFE OF…” [OPTIONAL… MAINLY UTILIZED IN IT SOFTWARE PROJECTS]**
2. Provide a brief “Day in the Life of…” for each unique user group that interacts with this service.
	1. Typically recommend limiting each to a single page. Bullet points or step-by-step narration is encouraged.

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**PART #4 – DESIRED OUTCOMES**

1. **PROJECT/SERVICE GOALS:**
	1. Identify the major goals, expectations, or benefits of the new project/system/service.

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* 1. What must the project/service accomplish to receive a 10-out-of-10 rating?

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* 1. If this a renewal service, is the goal to maintain the current level of service/performance?

*[ ]*  Does not apply (this is not a renewal service)

*[ ]*  Yes, we are expecting to simply maintain current service/performance

*[ ]*  No, we expect to increase service/performance (identify the critical areas that will need to be improved below):

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1. **VENDOR GOALS:**
	1. Identify any specific goals, expectations, or benefits of the vendor (that may differ from project goals).

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* 1. What must the vendor accomplish to receive a 10-out-of-10 rating?

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1. **SCHEDULE / TIMING:**
	1. If applicable, what is the term of this contract (in years)?

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* 1. If applicable, will there be options to renew? List the number of renewals:

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* 1. If applicable, list the term of each renewal (in years):

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* 1. Are there any critical dates that the vendor should be aware of? (Start date, end date, service dates, planned shut downs, holidays, days that vendor is not allowed to work, project opening, etc.)?

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* 1. Are there any *critical hours of operation* that the vendor should be aware of? (Normal business hours, after hours, hours that the vendor can access the building, hours of support, emergencies, etc.)?

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* 1. Are there any other projects that may impact the time/schedule/dates of this project/service?

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1. **COSTING / FEE:**
	1. Are you expecting the cost/fee to be proposed as a:

*[ ]*  Lump Sum / Fixed Price

*[ ]*  Unit Pricing

*[ ]*  Other

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* 1. What are the top 5 main deliverables/products/services/categories you expect to purchase in this procurement (what are the major areas you expect to purchase within your budget/estimated spend)?

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* 1. Describe any alternatives or options that should not be considered part of the scope, but you would like pricing for.

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**PART #5 – SCOPE OF WORK**

1. **DETAILED LIST OF REQUIREMENTS:**
	1. Provide all of the details and requirements that must be met to achieve your desired outcomes. What is the base case that you want all proposing vendors to meet.

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* 1. Describe each of the deliverables/products/services to be provided by the selected vendor for this scope of work (note: each of the main deliverables identified in Part #4-4 should be described here).

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* 1. What are the minimum requirements that must be performed (by the vendor or by the service/project) to meet the goals/expectations?

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* 1. Are you providing detailed specifications, design documents, plans, drawings, minimum standards?

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| *[ ]*  Specifications are attached  |
| *[ ]*  No additional specifications will be provided |

* 1. Provide all requirements that must be met to achieve a 100% performance satisfaction

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1. **SPECIAL/UNIQUE REQUIREMENTS:**
	1. Identify any unique requirements about this project/service (that may not be typical to other ‘similar’ projects that the vendor has done. Is there anything about this project that would make it unlike any other project that a vendor has done?

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* 1. Are there any constraints that you have, or the vendor may have, or the system may run into?

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* 1. Is there anything that is excluded from this project/service that the vendor must be aware of?

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* 1. Are there any future conditions (outside of this scope of work), that the vendor should keep in mind?

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* 1. Identify if you have made any assumptions (about the service/project or about the vendor)?

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**PART #6 – PROJECT RISKS**

1. **POTENTIAL RISKS TO THE PROJECT:**
2. Identify any items that may cause the project to *not* meet expectations.
3. Identify the main concerns that you have.
4. Identify any outcomes/approaches/issues you want to be 100% sure we can avoid.

(Include any potential items that are beyond the current control of the Owner, Vendor, or Design Professional; and any risks that are otherwise unforeseen/undefinable/unknowable at this time)

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