**NOTE**: This Scope of Work (SOW) template has been developed by the Division of Purchasing. It is intended to be a helpful guide and not all sections will apply to every procurement. Content should be tailored to reflect the specific needs of the goods or service being solicited. Agencies should consult with their legal representations when creating a SOW.

1. **Introduction**

Provide a high-level overview of the project and its purpose. Briefly describe what the agency is trying to achieve and what success looks like. This might include descriptions of the goods or services, but ultimately describes the anticipated result. This is the “What and When” section of the SOW. What you need done and when. Think: What’s this project about and what do we expect to happen?

1. **Background**

Tell the story behind the project and how it came to be. Explain the reason or mission driving the need for the project. This section may include historical context, legislative reasoning, or strategic goals. Help vendors understand the “Why” so they can propose better solutions. Think: Why are we doing this project now?

1. **Scope of Work**

Clearly describe what works needs to be done. Outline the major goals, services or deliverables the contractor is expected to provide. This section defines the boundaries of the work, what is included and what is not. You may choose to use bullets or tiers to organize objectives. Focus on outcomes over how the contractor must perform the work, unless specific methods are required. Include where the work will be performed and an estimated timeframe for each key task or phase. Think: What is the contractor responsible for doing, and what is outside the scope?

1. **Requirements**

List the specific responsibilities, materials, licenses, or actions required by the contractor and/or the agency to make the project successful. This may include things like project meetings, safety protocols, performance standards, or permit responsibilities. Outline major tasks (milestones) and if applicable include expected dates and how progress will be measured. Think: What do both sides need to bring to the table to get the job done?

1. **Compliance**

Explain how the contractor’s performance will be evaluated. Identify the standards, laws, benchmarks, or quality metrics that will apply throughout the project. Define what is acceptable performance and what reporting will be required (weekly reports, data submissions). Avoid vague terms and be specific about what is required, when and how. Think: How will we know the contractor is meeting expectations?

1. **Project Deliverables**

List tangible end products or results the contractor must submit. Describe the format, quantity, deadlines and delivery method. Each deliverable should match a task and be measurable. Think: What exactly will the contractor hand over, and how do we know it’s complete?

1. **Project Timeline**

Provide a schedule for the entire project. Include a start and end dates, key milestones, and deadlines for deliverables. A table format can help show the expected timeline. If applicable, you may ask the contractor to propose a detailed timeline in their proposal. Think: When will each part of the project happen?

1. **Project Budget**

If known, provide the anticipated or approved budget for the project. Stating a general budget can help vendors propose solutions that are realistic. If a specific budget is not attached to the project and the resulting contract will be used on an as needed basis, consider providing historical usage data instead. This can help vendors understand the potential scope and frequency of purchases or services. Be sure to clearly state that this information is provided for informational purposes only and does not represent a guarantee of future usage. Think: What are we planning to spend or expect proposals to fall within?

1. **Reference Documents**

Reference documents may be included to support or clarify the SOW. Examples include maps, technical drawings, specifications, floor plans, product manuals, work flow diagrams or site photos. If needed, these can be included as additional attachments to the solicitation. Think: What extra materials can help the vendor respond accurately?

**NOTE:** The following table provides side-by-side examples of strong and weak Scope of Work (SOW) language for each section of the template. These examples are centered around the same project, a new inventory tracking system, so that you can easily compare examples.

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| **Section** | **Good Example** | **Poor Example** |
| **Introduction** | This project will implement a new inventory tracking system for all warehouse locations. The contractor will design and deploy the system by December 1, provide user training, and offer 12 months of ongoing support. Weekly check-in meeting is expected throughout the implementation period. | The agency seeks to initiate an overarching solution to address general inventory concerns. The contractor will leverage appropriate processes to achieve desired outcomes. Timing and deliverables are subject to future clarification. |
| **Reasoning:** | It clearly defines what the project is, what the contractor is expected to do, and when the work must be completed. It sets expectations up front, making the project’s purpose and timeline easy to understand. | The language is overly vague and complex, making it hard to understand the actual goal. Key details like deliverables and timelines are missing or unclear. |
| **Background** | Currently, our warehouse relies on paper-based inventory logs, leading to errors and inefficiencies. An audit last year recommended digitizing inventory processes. This project aligns with the agency’s strategic goal to improve operational accuracy and transparency. | Over the years, various efforts have been made to improve different aspects of operations. There have been some discussions about technology and possible upgrades. Leadership has expressed interest in exploring potential improvements, and this project is part of that broader vision. |
| **Reasoning:** | It provides context and explains the specific problem the project aims to solve. It ties the need to strategic goals and gives vendors insight into the “why” behind the request. | It is vague and disconnected from the project. It doesn’t explain the actual problem or why the work is being done, making it hard for contractors to tailor their solutions. |
| **Scope of Work** | The contractor will assess current inventory practices, design a customized inventory system, install equipment at five locations, and train 50 users. Work will be done onsite during normal business hours. Hardware procurement is included. Ongoing system hosting is not included and will be handled by internal IT staff. | The contractor will help improve the inventory system and perform setup, support, and other related services as needed. Work may occur at various locations and should align with general agency expectations. Specific tasks will be discussed later. |
| **Reasoning:** | It outlines specific tasks, what is included and excluded, and where and when the work will happen. The scope is focused on outcomes and avoids micromanaging the process. | It uses vague terms like “other related services” and lacks clear boundaries. It doesn’t define what success looks like or what the contractor is responsible for, increasing the risk of scope creep. |
| **Requirements** | The contractor must provide all hardware, installation tools, and training materials. The agency will provide building access, electricity, and designated staff for system testing. The following milestones are expected:* Site assessments completed by Sept 1
* Installation by Oct 15
* Training delivered by Nov 15
 | The contractor is expected to bring all necessary tools, supplies, and backup equipment, and should anticipate any facility limitations. Contractor should be familiar with the facility and policies. Any permits, security clearances, or approvals must be obtained independently prior to the start of work. |
| **Reasoning:** | It clearly assigns responsibilities to both the contractor and the agency, outlines required materials, and defines milestones with target dates. This helps both parties plan and perform successfully. | It assumes the contractor already knows what the agency will provide and includes unreasonable expectations. It lacks mutual responsibility and sets the contractor up for failure. |

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| **Section** | **Good Example** | **Poor Example** |
| **Compliance** | All equipment must meet ISO 9001 standards. Weekly progress reports must include site visit summaries, current task status, and any risks or delays. Reports are due every Friday by 2:00 PM. The project manager will review deliverables to confirm they meet agency expectations. | The contractor should ensure compliance with all applicable standards and best practices. Frequent updates are expected to keep the agency informed of progress. All work must meet high-quality expectations. Any issues should be addressed promptly to avoid delays. |
| **Reasoning:** | It references specific standards, reporting requirements, and performance review methods. It includes measurable expectations and sets a structure for monitoring. | It uses vague terms like “frequent updates” and “high quality” without defining what those mean. There’s no way to verify compliance or hold the contractor accountable. |
| **Project****Deliverables** | One completed inventory system installed at five locations, 50 staff trained (training logs must be submitted), one system user manual (digital), and one final report summarizing project outcomes and lessons learned. | The contractor will complete the work and submit a report at the end. All final materials should be turned in once everything is done. The report should cover the project and show that the work is complete. |
| **Reasoning:** | It clearly lists what must be delivered, how many, by when, and in what format. Each deliverable is measurable and tied to the project’s goals. | It uses generic terms like “submit a report” and “final materials” without explaining what that means. It leaves out formatting, deadlines, and how completeness will be judged. |
| **Project****Timeline** | Kickoff Meeting – August 1Site Assessments – September 1System Installation – October 15User Training Completed – November 15Project Closeout Report – December 5 | The project should begin as soon as possible and be completed in a timely manner. Major tasks will be addressed as they come up. A detailed timeline may be discussed during implementation. |
| **Reasoning:** | It provides a structured schedule with start and end dates, milestones, and deliverable deadlines. It makes expectations clear for both planning and accountability. | It uses open-ended language like “as soon as possible” with no specific dates or milestones. This causes confusion and prevents effective project management. |
| **Project****Budget** | The agency has budgeted up to $250,000 for this project. This includes all equipment, labor, travel, training, and support. | The contractor should keep costs reasonable and competitive. Exact budget figures are not available at this time. Pricing should include everything needed, and the agency expects the contractor to stay within budget. |
| **Reasoning:** | It gives vendors a realistic cost expectation, helping them submit accurate proposals. It also clarifies what is included in the budget (labor, travel, equipment). | It uses vague language like “keep costs reasonable” and provides no guidance on expected budget or scope. This invites under or over-bidding and misaligned proposals. |
| **Reference****Documents** | Vendors should review the following reference materials: Attachment D: Warehouse floor plans for each locationAttachment E: Inventory system feature requirementsAttachment F: IT security compliance checklist | Contractors may refer to previous documents and materials related to similar projects. Additional information may be provided later upon request if necessary. |
| **Reasoning:** | It lists specific, relevant documents and attachments that support the SOW. It helps vendors understand site conditions, technical requirements, and security needs. | It vaguely mentions that documents *may* be available and doesn’t provide any specifics. This leaves vendors without the information needed to prepare informed responses. |

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