

GUIDELINES FOR STATEMENTS OF WORK

Include the following as appropriate:

1.0 PROJECT SUMMARY

Provide a paragraph including the following information, as appropriate:

- Project description
- Objectives
- Relevant background
- Relationship of project to your company's plans and programs

2.0 DESCRIPTION OF PROJECT SERVICES/WORK

Describe tasks or services to be performed by supplier, including, as appropriate:

- Tasks to be performed
- Specific responsibilities of supplier
- Specific responsibilities of your company's personnel, if any
- Expected results
- Note: use "active" voice

3.0 DELIVERY/PERFORMANCE SCHEDULE

Specify project schedule, including:

- Project start date
- Dates for completion of project phases or milestones
- Dates for delivery of goods/services/deliverables
- Project completion or implementation date

4.0 DELIVERABLES

List the project deliverables with a description of each deliverable. Examples are as follows:

- Products/Goods
- Services
- Project Plan
- Data
- Reports
- IT systems/software
- Examples/Samples of deliverables

5.0 PERFORMANCE STANDARDS AND MEASURES

Describe or reference attachment of service level standards and/or scorecard

6.0 SPECIFICATIONS

- Describe technical, functional or design specifications to be met
- May reference separate document if long (but then incorporate by reference)

7.0 STAFFING

- List any key personnel, including subcontractors, who will be assigned to the project.
- Specify any right of your company to interview and approve key personnel.

8.0 ACCEPTANCE CRITERIA

- Describe acceptance/testing procedures
- Describe criteria for acceptance
- Identify individual who will approve work

9.0 PACKAGING AND SHIPPING

Describe, as applicable, requirements for shipping (P.O. terms and conditions already specify these terms):

- Packaging and packing instructions
- Shipment method and risk of loss
- Party to pay freight expenses

10.0 FEE SCHEDULE/EXHIBIT

- Describe amount to be paid for work
- Specify kind of fees:
 - Hourly
 - Fixed
 - Not-to-Exceed
 - Note: look out for “estimated” language
- For Fixed-fee and not-to-exceed projects, describe how payments will be billed during project (by completion of milestones, deliverables, percentage of work complete, etc.)
- Describe allowed expenses, if any
 - Specify or require pre-approval
 - State that supplier will comply with your company’s expense guidelines
 - List any caps on expenses (e.g. “not to exceed 15% of total fees”)
- Specify any penalties for non-delivery

11.0 CHANGE ORDERS EXHIBIT

- Draft form letter for approval of change orders

GUIDELINES FOR STATEMENTS OF WORK

Include the following as appropriate:

1.0 PROJECT SUMMARY

Provide a paragraph including the following information, as appropriate:

<input type="checkbox"/>	Project description
<input type="checkbox"/>	Objectives
<input type="checkbox"/>	Relevant background
<input type="checkbox"/>	Relationship of project to company's plans and programs

2.0 DESCRIPTION OF PROJECT SERVICES/WORK

Describe tasks or services to be performed by supplier, including, as appropriate:

<input type="checkbox"/>	Tasks to be performed
<input type="checkbox"/>	Specific responsibilities of supplier
<input type="checkbox"/>	Specific responsibilities of company personnel, if any
<input type="checkbox"/>	Expected results
<input type="checkbox"/>	Note: use "active" voice

3.0 DELIVERY/PERFORMANCE SCHEDULE

Specify project schedule, including:

<input type="checkbox"/>	Project start date
<input type="checkbox"/>	Dates for completion of project phases or milestones
<input type="checkbox"/>	Dates for delivery of goods/services/deliverables
<input type="checkbox"/>	Project completion or implementation date
	Ramifications for late deliverables or late deliveries

4.0 DELIVERABLES

List the project deliverables with a description of each deliverable. Examples are as follows:

<input type="checkbox"/>	Products/Goods
<input type="checkbox"/>	Services
<input type="checkbox"/>	Data

<input type="checkbox"/>	Reports
<input type="checkbox"/>	IT systems/software
<input type="checkbox"/>	Project Plan
	Deliverables/ Due Dates

5.0 PERFORMANCE STANDARDS AND MEASURES

<input type="checkbox"/>	Describe or reference attachment of service level standards
<input type="checkbox"/>	Scorecard

6.0 SPECIFICATIONS

<input type="checkbox"/>	Describe technical, functional or design specifications to be met
<input type="checkbox"/>	May reference separate document if long (but then incorporate by reference)

7.0 STAFFING

<input type="checkbox"/>	List any key personnel, including subcontractors, who will be assigned to the project
<input type="checkbox"/>	Right to interview/approval

8.0 ACCEPTANCE CRITERIA

<input type="checkbox"/>	Describe acceptance/testing procedures
<input type="checkbox"/>	Describe criteria for acceptance
<input type="checkbox"/>	Identify individual who will approve work

9.0 PACKAGING AND SHIPPING

Describe, as applicable, requirements for shipping:

<input type="checkbox"/>	Packaging and packing instructions
<input type="checkbox"/>	Shipment method and risk of loss
<input type="checkbox"/>	Party to pay freight expenses

10.0 FEE SCHEDULE (may be a separate Exhibit or Schedule)

<input type="checkbox"/>	Describe amount to be paid for work
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<input type="checkbox"/>	Specify kind of fees: <ul style="list-style-type: none"> ○ Hourly ○ Fixed ○ Not-to-Exceed ○ Note: look out for “estimated” language
<input type="checkbox"/>	For Fixed-fee and not-to-exceed projects, describe how payments will be billed during project (by completion of milestones, deliverables, percentage of work complete, etc.)
<input type="checkbox"/>	Describe allowed expenses, if any <ul style="list-style-type: none"> ○ Specify or require pre-approval ○ State that will comply with company’s expense guidelines ○ List any caps on expenses (e.g. “not to exceed 15% of total fees”)