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# How to Write a Good Scope of Work

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# Speakers

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# Agenda

- I. Scope of Work Basics
- II. Writing a Good Scope of Work
- III. Scope of Work Pitfalls and Tips
- IV. Questions

# Scope of Work Basics

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# Definition of Scope of Work

A detailed written description of the conceptual requirements for project (materials and services) contained in a competitive solicitation document.

Includes a clear understanding of what is required by the vendor.

- What will be done
- When will it be done
- What constitutes an acceptable result

# When Do You Write a Scope of Work

- A scope of work is prepared and written at the beginning stages of any procurement.
- Becomes the basis for your procurement.

# Purposes for a Good Scope of Work

A clearly written scope establishes the following purposes:

- Establishes clear understanding of need
- Encourages competition
- Satisfies a critical company need
- Results in the best value
- Reduces risk

# Components of a Good Scope of Work

## ➤ Project Overview/Objectives:

- This is your problem statement. What is the problem you are trying to solve?

## ➤ Requirements:

- What exactly needs to be done in order to complete your project?



# Components of a Good Scope of Work

- Schedule/Milestones:
  - When do you want your project to start?
  - When is your proposed end date or need it completed by date?
  - What are the major milestones or phases of the project that you need to be able to track or measure progress by?
- Deliverables:
  - What do you need at the end of the project?



# Well-Written Scope of Work

- Reduces confusion
- Builds consensus and understanding of roles and responsibilities between parties
- Results in better scheduling, forecasting and coordination of resources
- Allows for easier evaluation

# Poorly Written Scope of Work

- Results in outcomes that fail to meet expectations
- Resource drain
- Increased costs
- Discourages vendors from bidding
- Potential disagreements and litigation

# Writing a Scope of Work

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# Scope of Work Steps

## I. Define Project Overview and Objectives

- Keep your explanation of the project at a high level, easy to understand.
- Why are you doing this project?
- What are your overall expected outcomes or what is it you are trying to solve?



# Define Project Overview and Objective

## Not so Good Example

- Company X requires the purchase, implementation, and maintenance of an application that will streamline productivity.

## Good Example

- The purpose of this project is to obtain a complete analysis of Company X's current database environment and multiple recommendations on how to upgrade/modernize to meet the needs identified below.



# Scope of Work Steps

## II. List requirements

- Complete – Fully stated in one place with no missing information
- Consistent – Cannot contradict any other requirement or authoritative documentation (laws, statutes...)
- Feasible – Must be able to be implemented within constraints of the project
- Verifiable – Requirement can be confirmed through testing
- Specific – Address one and only one thing



# Requirements

## Not so Good Requirement

- Email notification must include relevant information.
- It must be accessible.

## Good Requirement

- Email notification shall include dollar amount, date, payee name, and a unique identification number.
- System shall be designed according to usability standards 13a.3.



# Scope of Work Steps

## III. Deliverables

- What do you want to receive from the vendor?
- When do you want to receive from the vendor?
- Format you want to receive deliverables
- Usually coincides with timeline and payment schedule
- May be in steps or phases, i.e., Deliverable #1 Project Plan, Phase I is project plan completion



# Deliverable Examples

## Not so Good Example

Create a Project Support Plan for review and approval.

## Good Example

Create a Project Support Plan for review and approval by the Issuer's project manager. Support Plan to include, but is not limited to:

- Monitor and maintain project status reporting
- Support & manage project status reporting
- Support & manage risk & issue monitoring
- Support & manage scope change management
- Etc.

# Scope of Work Steps

## IV. Timeline

- Length of project
- May include certain date requirements
- May contain schedule for deliverables/phases

# Estimated Timeframe

## Not so Good Example

- System and functionality is long overdue for Issuer.

## Good Example

- The project is anticipated to take no longer than six (6) months.

# Scope of Work Steps

## V. Terms and Conditions

- What terms and conditions must be agreed upon
- May include payment and budget information
- May include reporting requirements
- May include some assumptions
- May include what is known to Issuer as out of scope

# Terms and Conditions

## Not so Good Example

- Reimbursement for Travel is allowed.

## Good Example

- Travel which is approved in advance by the Issuing PM will be reimbursed. All rules and regulations associated with travel reimbursement under this agreement can found at <http://osc.state.ny.us/agencies/travel/travel.htm>. In no case will any travel reimbursement be paid that exceeds these rates.

# Scope of Work Steps

## VI. Acceptance and Sign-off

- How will you accept project deliverables?
- Who reviews and signs off?
- Should provide guidance of what is success?
- More information provided reduces disagreements or failure to receive what you wanted to receive.



# Deliverable Acceptance

## Not so Good Example

- If no written response is received by the Issuer within three (3) business days, the deliverable will be assumed as accepted.

## Good Example

- Issuer shall have 15 business days from the date of delivery to accept any independently identifiable Project Deliverable(s). If Contractor is advised that any part of the Deliverable was not provided or that any delivery of the Deliverable was unsatisfactory, then Contractor shall have 15 business days to provide such Deliverable and complete or re-perform such Deliverable until Issuer is satisfied.



# Scope of Work Pitfalls and Tips

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# Scope of Work Pitfalls

Tip #1: Do not make the specifications more strict than they need to be.

- Leads to higher costs
- Leads to less competition

# Scope of Work Pitfalls

Tip #2: Be sure to include enough requirement details.

- Results in continuous quality issues/problems
- Items or services may not meet expectations

# Scope of Work Pitfalls

Tip #3: Avoid requirements that exclude acceptable vendors.

- May result in increased costs
- May not see a “good” vendor’s solution

# Scope of Work Pitfalls

Tip #4: Do not include outdated or obsolete specifications.

- May result in increased costs
- May not see all vendor's proposed solution
- Limits your competition pool



# Scope of Work Tips

- Be sure your requirements are clear, accurate and simple
- Do not use too technical language
- Organize your SOW so it is clear and easy to understand so as to receive a qualified response from a vendor.
- Be sure requirements are realistic and available in the market
- Be sure your timeline and deliverable schedules are realistic

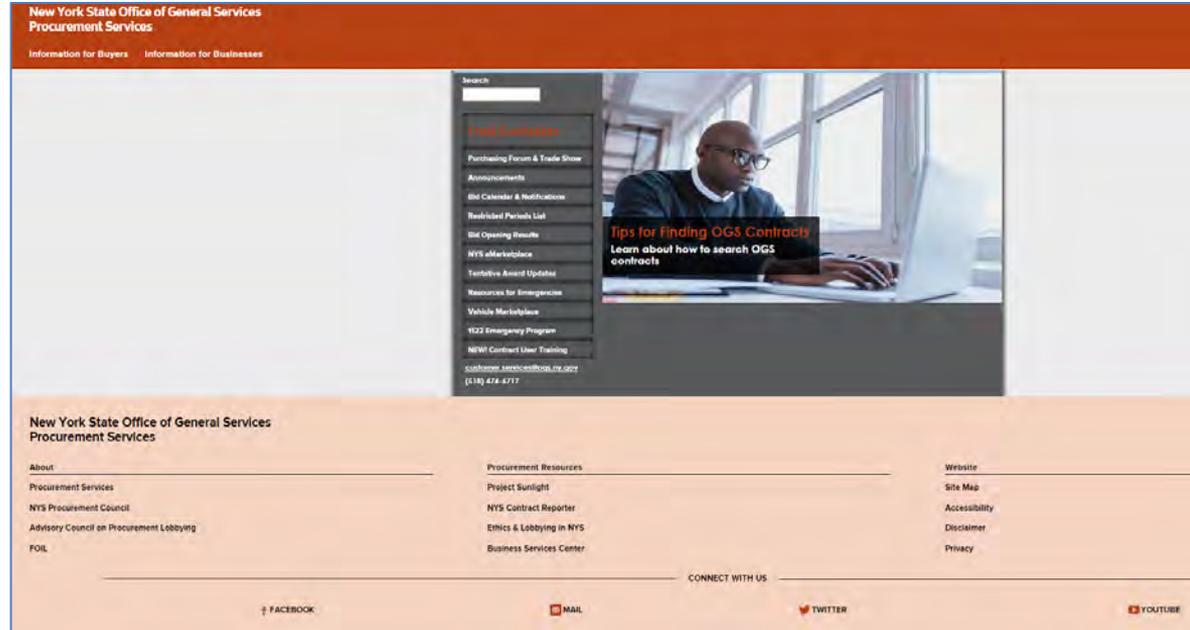
# Procurement Services Website

## Where to find it:

- [www.ogs.ny.gov](http://www.ogs.ny.gov)
- [www.nyspro.ogs.ny.gov](http://www.nyspro.ogs.ny.gov)

## What it offers:

- Information for buyers
- Information for business
- Contracts portal
- Contact information
- Links to other websites



# We are here to help!

Contact us today

(518) 474-6717

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Make sure to check out our  
website at

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# Questions?

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