



Office of
General Services

GOVBUY PROCUREMENT CONFERENCE

November 21-22, 2024

Empire State Plaza Convention Center, Albany, NY



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Writing a Successful Scope of Work

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Writing a Successful Scope of Work

Room 3 | 3:15 PM – 4:15 PM

PRESENTERS

Brandon Martin, RFXPremier
Cooperative Portfolio Manager

Solomon Kingston, NASPO ValuePoint
Deputy Chief Cooperative Procurement Officer

Goals For Today



Outline Components
of Successful Scopes
of Work



Provide Strategies for
Gathering
Requirements



Technology: When to
Use and When to
Sideline



Discussion of
Stakeholder
Engagement



Market Research



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The 'Why'

The Law of the 5 P's

Proper Preparation Prevents Poor Performance



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Early Questions to Consider

Who needs the product or service?

Why do they need it?

What product or service do they need?

When do they need it?

Where will it be used?

How will it be used?



The Details Matter!



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The Details Matter!



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Starting Out: Market Research

- Understand the Market
- Inform Procurement-Related Decisions
- Develop a Risk Management Plan
- Design Up-To-Date, Relevant Requirements
- Create Innovative Solutions



Helpful Market Research Tools



GovWin
from Deltek

qualtrics^{XM}



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Utilize Your Market Research



Document



Collaborate with the supplier community



Provide actionable suggestions for Stakeholders



Gather Examples



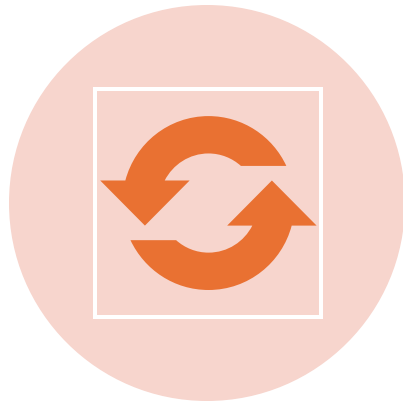
Align with industry best practices



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Engaging with Subject Matter Experts (SME)



ENGAGE EARLY!



DEFINE ROLES AND
RESPONSIBILITIES



OUTLINE COMMUNICATION
CHANNELS



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What to Expect from SMEs

- Technical Requirement
- Metrics, KPIs, Performance Measures
- Collaboration with other SMEs
- Identify Risks and/or Constraints
- Definition of Budget



Role as a Procurement SME

- Ensure Compliance
- Meet Requests with an open-mind: INNOVATE
- Avoid Scope Creep
- Be a Partner
- Utilize Available Resources



Still Need Clarity?

- Request for Information
 - Responses can be used to develop and/or validates pecifications
 - Gather information on possible vendor pool
- Better understanding of:
 - How well specifications align with market
 - Potential costs



Elements of Public RFPs

- Create Accountability
- Clearly defined performance measures
- Reports
- Transparency
- Delivery/Receiving



Scope of Work Components



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Set the Stage

- Background/Purpose
- Overall Objectives
- Information about your Organization



Requirements/Deliverables

- What are you buying?
- A balance of firm requirements and room for innovation
- Provide references/citations whenever appropriate
- Think beyond the deliverables:
 - Reports
 - Data
 - Communication
- Roles and Responsibilities of Parties



Performance Measures

- Importance directly relates to accountability
- S-M-A-R-T
- Informed by reporting
- Drive improvements



Understand Your Deliverables

Types of Project Deliverables

TANGIBLE DELIVERABLES

- Software applications
- Hardware components
- Reports or documentation
- Websites or mobile apps
- Marketing Materials



INTANGIBLE DELIVERABLES

- Improved processes or workflows
- Increased customer satisfaction
- Enhanced employee productivity
- Organizational change or cultural shifts
- Knowledge transfer or training programs



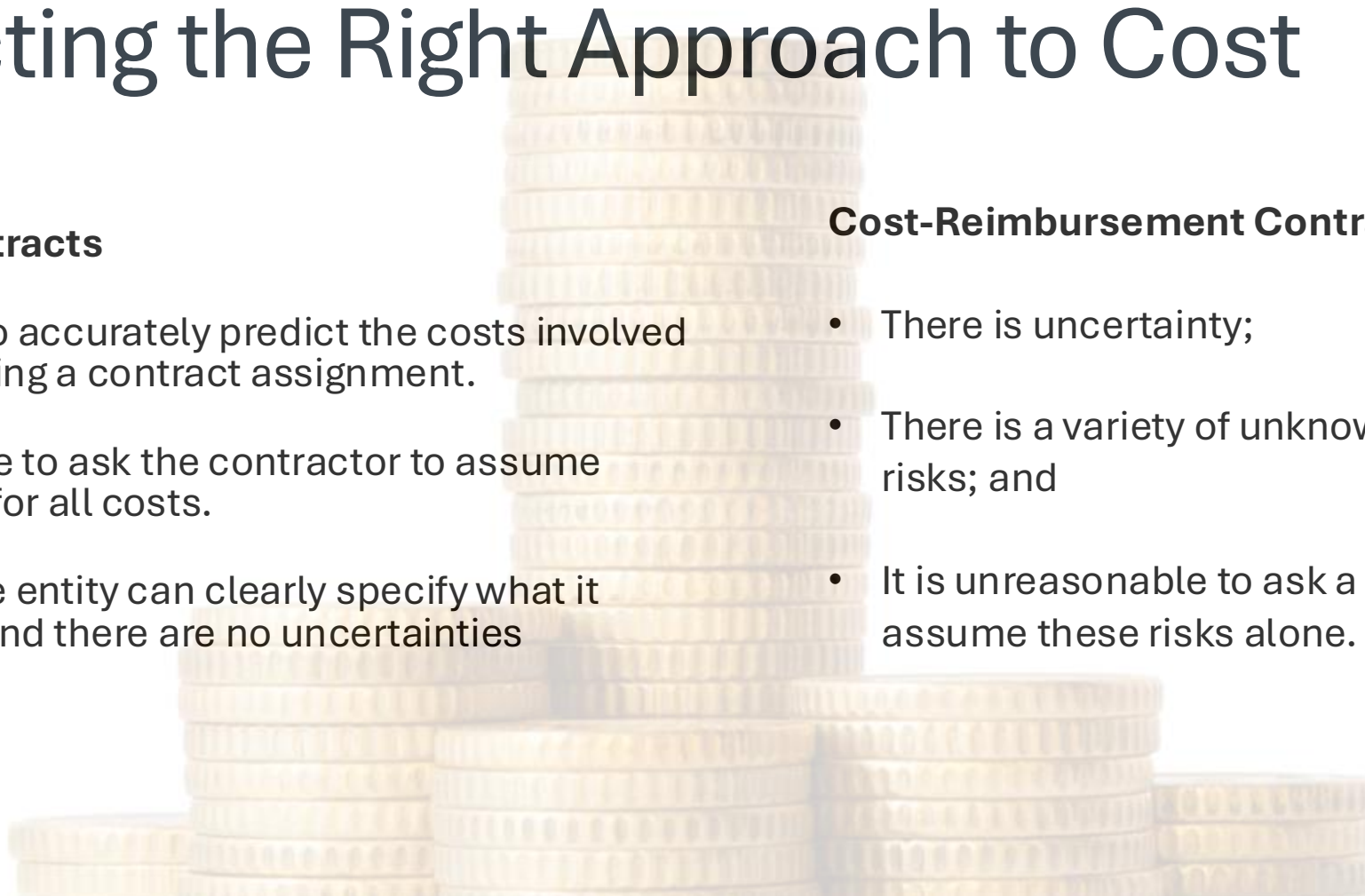
Selecting the Right Approach to Cost

Fixed Price Contracts

- It is possible to accurately predict the costs involved in accomplishing a contract assignment.
- It is reasonable to ask the contractor to assume responsibility for all costs.
- Used when the entity can clearly specify what it wants to buy and there are no uncertainties anticipated.

Cost-Reimbursement Contracts

- There is uncertainty;
- There is a variety of unknown potential cost risks; and
- It is unreasonable to ask a contractor to assume these risks alone.



ACTIVITY!



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Use of Technology Resources In Scope of Work Development



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Current Uses of AI In Public Procurement

- Approving small purchases (RPA)
- Request review & processing (RPA)
- Chat bots on websites (RPA)
- Contract Negotiations (ML)
- Fraud Detection (ML)
- Solicitation Drafting (GenAI)



Opportunities

- Automate routine tasks to free up staff time for strategic work
- See this as a tool - will need to train on how to use it effectively and correctly
 - “If the only tool you have is a hammer, everything starts to look like a nail”
 - Focus on strategic work/value add for organization- be intentional
- Generate useful data/insights
 - Spending patterns, better contract terms, negotiate contracts faster



Things to Keep in Mind

- Keep it in context
- Do not over-rely on AI
 - Ophelia Syndrome, Learn to think
- Human relationships are still paramount
- AI will NOT replace you
 - However, a person using AI could
- Ethics



Summary

- As a Procurement Official, drive the process
- Maximize Collaboration
- Do your homework
- Details, Details, Details
- Leverage all available resources





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Questions?