

Suggested Format for STATEMENT OF WORK

The Statement of Work is the most essential element of every contract since it tells the vendor what is to be accomplished. It may be as simple as a one-line statement for a vendor to furnish an off-the-shelf, commercial item, or as complex as to require several pages to describe the service or item needed.

In preparing a Statement of Work, use the following numbered layout:

1. Introduction

- Give a brief overview of **what** you want to buy i.e., the commodity or service you require.
- Briefly describe **why** this commodity or service is necessary.

2. Scope

- In clear and precise terms, define the work to be accomplished and indicate the main steps and actions which are required of the vendor.
- Outline the various phases of the work.
- Describe where the service will take place i.e., on-campus or off-campus.
- Describe the schedule/timeline for work to begin, including any milestones, and when it should be completed i.e., from beginning date to end date.
- Discuss specific technical objectives, and any special conditions or limitations.

3. Documents to Be Supplied or Referenced by the University

- Cite all applicable documents, specifications, reports, regulations, and other materials which have an impact on the procurement.

4. Reports, Data, and Deliverables

- Describe what you want the vendor to deliver during and at the end of the services they will perform.
- Describe any weekly, monthly, and final reports you may require.

5. Special Considerations

- Describe if the CSUEB will provide University property or equipment for the vendor to use.
- Discuss if you will pay the vendor for its travel expenses.
- Does travel expense include airfare, rental car, gas, parking, hotel, food, or other expenses?
- Do you expect to pay the vendor upon job completion, or will you allow multiple payments based upon each milestone completion?

Suggested Format for STATEMENT OF WORK

STATEMENT OF WORK CHECKLIST *(use the following to validate your SOW)*

1. Are specific duties of the vendor stated in such a way that he knows what is required?
2. Are sentences constructed so that there is no question of what the vendor is to perform i.e., "the vendor shall do this work,"? Has spelling and grammatical usage been checked?
3. Are all specifications and documents attached to the Statement of Work?
4. Have delivery dates and/or milestone dates been established? Are you specifying calendar days or work days in your schedule for completion of the work?
5. Have headings and subheadings been checked for format? Is the text compatible with the title?
6. Have all requirements been reviewed to ensure compatibility with the data requirements specified?
7. If University property is to be provided, have you listed the property to be furnished?
8. Does the Statement of Work include only such reports and documentation as are really needed for control and documentation of technical results?
9. Provide name of your department contact, phone, fax, email.
10. Provide any suggested vendor (s) contact with name, phone, fax, email.
11. Email the Statement of Work (as a separate document) to the Purchasing Manager.