

## Developing an Effective Statement of Work (SOW)



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Quality Partnership Conference – Washington, DC  
August 2007

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### The Parts

- Background
- Objectives
- Scope and Tasks
- Selection Criteria
- Deliverables
- Government Furnished Equipment (GFE)
- Security Requirements
- Sustainability Requirements
- Place and Period of Performance
- Format for Pricing



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### Background

- Project Purpose
- General Project History
- Current Status
- Statutory and Regulatory Authority
- Related Projects
- Outside Influences
- Unknowns
- Limitations
  - after hours work
  - phased implementation
  - non-work periods due to internal workloads, (i.e. grant reviews, tax return processing, etc.)



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### Objectives

- What is the expected outcome
- Measurable goals (demonstrated results) and intangible goals
- Problems to correct
- Opportunities and constraints



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### Scope and Tasks

- Overview of the contractor's effort
- Limits of the project (site and scope)
- Outline tasks required
- List in a logical progression
- Use precise language, directives
- Use language and terms regularly used in the industry. Requires an understanding of the way the industry works and project process
- Review for clarity – remove redundancy



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### Selection Criteria

•List the criteria/measurements for selection, for example:

- Company and Key personnel experience with projects of similar scale and complexity
- Positive feedback from references
- Technical knowledge relevant to the project
- Clearances or security required
- Location of performance (on or off-site)
- Identify specialized expertise, services, and/or training
- Documentation to certify the required credentials
- Identify specific performance thresholds or capabilities deemed important for the success of the project



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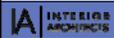
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### Deliverables

- List what the contractor shall provide
- Specify the quantities and formats (hardcopy and electronic)
- Provide a schedule for the submissions based on task duration
- Specify where and to whom the submittals are made



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### Government Furnished Equipment and Information

- List items that will be provided by the government
- Include materials, equipment, services, reports, documents, etc.
- Describe limitations on the equipment or information's use during and after the project



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### Security

State security requirements the contractor must follow. If allowed, define:

- clearances required
- restrictions to the project site.



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### Sustainability

- LEED Certified Project
- LEED Certified Project Team Members
- ISO 14001 Certified Manufacturers



LEED = Leadership in Environmental and Energy Design

ISO 14001 Certified Manufacturers comply with quality and process management standards designed to reduce a negative impact on the environment



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### Place of Performance

- On-site
  - On-site hours
  - IT access and support
  - Security restrictions
- Off-site
  - State when the contractor is expected to be on-site



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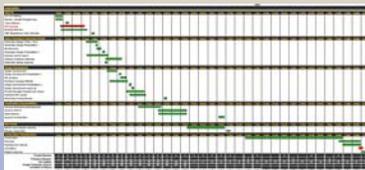
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### Period of Performance

- List the deadlines for specific tasks in durations
- Commit to review and approval durations
- Be realistic or explain unrealistic deadlines
- Allow for time saving strategies by the contractors



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**MCC**

EXECUTIVE RECEPTION

**CHALLENGE:**

- Establish requirements for a new government agency
- Create a unique identity.

**SOLUTION:**

- Flexibility to change as they grow.
- Neutral color palette, rich in tonal and textural values
- Sophisticated environment without being opulent.



IA INTERIOR ARCHITECTS

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**Project and Sample Scope for Services**

Furnishings Selection and Procurement Assistance

- Contractor will develop typical workspaces for staff and support space, including executive offices, management, professional and administrative staffs.
- Each workspace will list the components and capacities of work area, storage and seating. The drawings and descriptions shall be suitable for a GSA FSS procurement process.
- Prepare generic performance specifications for signage and ancillary furniture selections.
- Prepare RFP documents to include typicals, performance specifications, estimated quantities, evaluation criteria, pricing quote formatting.
- Assist the agency in reviewing the bids. Evaluate the submissions based on the selection criteria.



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**MCC**

WORKSPACE SPACE STANDARDS

Room Name: Chief Executive Officer 300 square feet  
 Vice President 225 square feet  
 Managing Director 175 square feet  
 Director 125 square feet  
 Program Officers / Assistant Country Director 90 square feet  
 Specialist 72 square feet  
 Administrative / Staff 64 square feet

TYPICAL WORKSTATION PLANNING MODULES

3-HIGH FILES WITH WORK SURFACE

4-HIGH FILES

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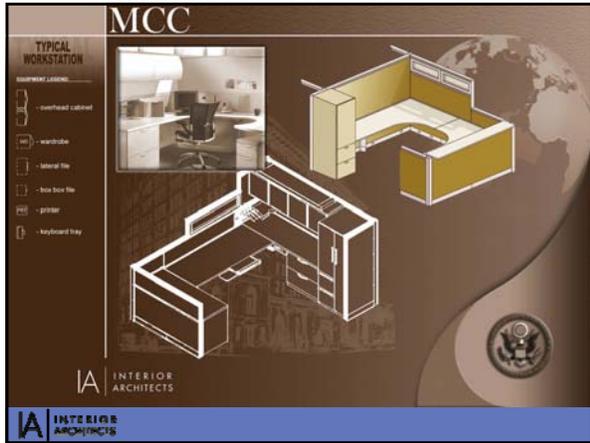
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**Project and Sample Scope for Services**

- Millennium Challenge (MCC)

**Test-fits**

- Upon MCC's approval of the programming phase and the selection of a building, IA will:
  - Develop a preliminary space plan/test-fit.
    - Include one (1) major and two (2) minor revisions
    - Indicate the locations of the various facilities
  - Reconcile the space required and the functional relationships with the existing building floor plan.
  - Space plans will show true wall thickness, doors, furniture, (including panel creep), millwork elements and proposed architectural features.
  - Review the plans with MCC for compliance with the users' operational requirements.

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**Tips:**

- Understand what the industry will provide and will that meet your needs
- Understand that gaps in services and contracts must be bridged with contract modifications or new procurements
- Stipulate quantities, be specific
- Use simple words and phrases
- Be precise, concise, and consistent -Use active verbs
- Avoid opened descriptions, catch phrases such as "as needed" or "as directed" or "subject to approval".
- Eliminate redundancy
- When selecting the evaluation criteria do not force duplication when describing the RFP response

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**Tips:**

- Define technical terms
- Use abbreviations or acronyms only after spelling out the term first
- Make available referenced documents. If the document is used as a guide or standard, state the date or version used
- Describe how changes from the client will be managed
- Define frequency of re-occurring events, pay for a specific amount
- Use industry standard documents GSA P100, NAVFAC, USAF CID all have defined the design process and expected results
- Describe the submittal approval process and contractor's role
- If conditions are unknown, include a way to isolate unknowns and resolve unknown conditions from the project.

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