Guidelines for Writing a Scope of Work

The Scope of Work (SOW) is the area in an agreement where the work to be performed is described. The SOW should contain any milestones, reports, deliverables, and end products that are expected to be provided by the performing party. The SOW should also contain a time line for all deliverables.

The problem with most Scopes of Work is a lack of specificity, namely, when the two parties disagree on what should have been delivered and a review of the SOW does not support one interpretation over the other. This problem is common in research agreements and is often where disputes arise. The best way to avoid this problem is to avoid any and all ambiguity.

A Scope of Work should include the following components:

1. Glossary
2. Problem Statement
3. Goals of the Agreement
4. Objectives of the Agreement/Deliverables
5. Administration
6. Timeline.

1. Glossary

In the Glossary, spell out each acronym used in the SOW. Also include definitions of odd or unusual terms. Think about the document from the perspective of someone who does not work in the particular industry or discipline.

2. Problem Statement

Succinctly describe the problem that this research will address (1 or 2 paragraphs is fine). Describe the scientific and technological baseline, that is, the current state-of-the-art or developmental status of the field to be advanced.

3. Goals of the Agreement

At the beginning of this section, complete the following sentence (please be succinct):

The goal of this project is to…

Complete the sentence with a brief description of the goal(s) and how the goal(s) will be met. Goals can be technical, economic or social. Please be brief, two to three sentences maximum.

4. Objective of the Agreement/Deliverables

Complete this section with the objectives of the project, which are things that will be measurable or knowable at the end of **this** agreement—this is where the deliverables should be listed. **Deliverables are comprised of a task and an end product.**

Poor Example:

Task: Assess class needs for public health awareness.

Deliverable: Write curriculum to address needs.

The problem with the above example is that nothing is specified. The task should have measurable in it and the deliverable must be quantifiable.

Good Example:

Task: Survey 4 classes of 20 students in asthma awareness. Each class will answer a 25 question survey that assesses their general knowledge of asthma issues as they relate to public health. One reviewer should take about 1 hour with each class to take the survey and another 2 hours per class to assess the data.

Deliverable: A 10-hour curriculum for graduate student classes of up to 20 students that addresses issues of deficiencies in public health awareness in asthma prevention and care.

By reading the task and deliverables, the administrative personnel should be able to construct the budget associated with the SOW. More importantly, in reviewing the deliverables, there should be no question about what is expected of the performing party. A SOW may contain many deliverables, but each should be broken down into tasks and end products to specify what is expected.

5. Administration

If there are meetings, calls, conferences, or other "soft" deliverables, they should be outlined in the administration portion of the SOW. Any requirement that is not an end product of a specific task, but is required of the performing party, needs to be described in the administration section of the SOW.

Poor Example:

PI will be required to give weekly reports of progress during the soy bean season with more frequent reports during the height of the season.

The problem with the above example is that it does not specify what needs to be in the reports, what "more frequent" means, and when the "height of the season" is.

Example:

PI will be required to give weekly reports consisting of: wind pattern analysis, fungi spore distribution, and potential risk areas. During the height of the season, May 15-July 15, the PI may be required to give twice-weekly reports.

6. Timeline

This section lays out all dates for the project. It states dates for the tasks and deliverables. It also covers the dates for the administration portion of the SOW.

Between the Glossary, Problem Statement, Goals of the Agreement, Objectives /Deliverables, and Administration components of the SOW, there should be no ambiguity as to what is expected of the performing party. Together, these elements should paint a thorough picture of what is expected, when, and in what form, while noting any special requirements.