

# **PROJECT MANAGEMENT DOCS**

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## **STATEMENT OF WORK TEMPLATE**

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## **STATEMENT OF WORK (SOW)**

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**INTRODUCTION/BACKGROUND**

The Statement of Work (SOW) is a document which describes the scope of work required to complete a specific project. It is a formal document and must be agreed upon by all parties involved. In order to be effective, the SOW must contain an appropriate level of detail so all parties clearly understand what work is required, the duration of the work involved, what the deliverables are, and what is acceptable. This section should provide a general description of the project as well as highlight the project's background and what is to be gained by the project. As the SOW often accompanies a request for proposal (RFP), the SOW introduction and background is necessary for bidding vendors to familiarize their organizations with the project.

**EXAMPLE:**

Smith Consulting Group (SCG) has recently approved the Website Redesign Project in support of its strategic plan to enhance marketing and customer service. In order to provide more timely feedback to prospective clients and improved customer interaction, the Website Redesign Project will focus on building a content rich website which provides a simplified and more user-friendly approach for existing and potential clients. It is imperative that SGC utilizes its web site as a platform for communicating new developments, client testimonials, recent news, and other industry specific information. SGC also realizes the importance of working with clients to develop tailored consulting solutions which the new web site will allow the ability to do. In order to accomplish this, SGC seeks to outsource the design, testing, implementation, and training for the new website. SGC anticipates that its new website will move the company forward in its multi-tiered approach to winning new clients and capturing additional market share.

**ENHANCED APC FACULTY LOADING SYSTEM:**

The Program Head of the School of Computing and Information Technologies (SoCIT), a department in Asia Pacific College (APC), has recently approved a project to be developed by computer science students. This project is to enhance the Faculty Loading System of APC, specifically, the SoCIT department. The Program Head intends to have the Faculty Loading System be automated. In order to be effective, the system should help speed up the process of loading schedule to teaching assignments and faculty members. Also, the Program Head intends to have an Analytics-based Reporting Module based on such criteria: availability of faculty members, online teaching evaluation data, faculty specialization, faculty teaching history from Flavio module, list of course offerings from Flavio module, list of course schedule and room assignment from Flavio Module.

**SCOPE OF WORK**

This section should provide a brief statement of what you expect to accomplish as a result of this scope of work. While specific deliverables and tasks will be presented in the Work Requirements section, this section should highlight what is and is not included in the scope of the project in broader terms.

**EXAMPLE:**

The scope of work for the Website Redesign Project includes all planning, execution, implementation, and training for a new public-facing internet site for SCG. The selected vendor will be responsible for the design of the new website based on feedback to be provided by SCG.

Each stage of the project will require approval from SCG management before moving on to the next stage. The selected vendor must ensure it has adequate resources for designing, building, testing, and implementing the new web site and is staffed for the training of SGC personnel as well. Specific deliverables and milestones will be listed in the Work Requirements and Schedules and Milestones sections of this SOW.

Not included in the scope of work for this project is any work on SCG's internal intranet site.

## **ENHANCED APC FACULTY LOADING SYSTEM:**

The scope of work for the Enhanced APC Faculty Loading System includes that the system should be integrated to APC's current information system – Flavio System that contains the course offering, history of teachings of each faculty, and the specialization of each faculty. The new module, if approved, needs to be a site that should only be accessed internally. Each added feature in the prototype should be approved by the group's adviser. The systems developer and systems designer ensures that each requirement would be met, and should each requirement would be tested.

## **PERIOD OF PERFORMANCE**

This section should define the time period over which the project will occur. The timeframe for the project can be pre-determined or based on a completion date to coincide with some external requirement (i.e. new Government regulation). It is important to define the period of performance since this is usually a variable in the project's cost. Additionally, if there are delays in a project and it will not be completed within the defined period of performance, a contract modification may be required and the costs of the project will increase as well.

### **EXAMPLE:**

The period of performance for the Website Redesign Project is one year (365 days) beginning on 2 March 20xx through 3 March 20xx. All work must be scheduled to complete within this timeframe. Any modifications or extensions will be requested through SCG and vendor contracting officers for review and discussion.

## **ENHANCED APC FACULTY LOADING SYSTEM:**

The period of performance for the Enhanced APC Faculty Loading System is good for a year beginning on January 11, 2016 through December 23, 2016. All necessary documents, diagrams, and the system itself should be completed within the given timeframe. Any modifications or changes will be significant in the PBL 2 beginning next term, during Software Development.

## **PLACE OF PERFORMANCE**

This section should describe where the work will be performed by the vendor. In some cases the vendor may perform all or some of its work on site at the customer's location. This is usually dependent on the type of industry or work being performed. It is important to define this in case the customer requires the vendor to work at the customer's site and to clarify any equipment and/or work space that will be provided.

### **EXAMPLE:**

The selected vendor for the Website Redesign project will perform a majority of the work at its own facility. The vendor will be required to meet at SCG's facility once per week (day and time TBD) for a weekly status meeting. Additionally, all project gate reviews will be held at SCG's facility and attended by the vendor. SCG will provide and arrange for meeting spaces within its facility for all required vendor meetings. Once the project reaches the training phase, all training will be conducted at SCG's facility.

## **ENHANCED APC FACULTY LOADING SYSTEM:**

The user of the Enhanced APC Faculty Loading System, the program head, will perform the majority of the work at its own facility. The Program Head need not to meet the faculty members in person at his/her office because the system is now automated. All questions and inquiries of each faculty should be sent via email or via the module.

## **WORK REQUIREMENTS**

This section should include a description of the actual tasks which the project will require. This should include what tasks need to be completed in order for successful completion of this project/contract. As with all other portions of the SOW, every effort should be made to include as much detail as possible.

### **EXAMPLE:**

As part of the Website Redesign Project the vendor will be responsible for performing tasks throughout various stages of this project. The following is a list of these tasks which will result in the successful completion of this project:

#### **Kickoff:**

- Vendor will create and present detailed project plan including schedule, WBS, testing plan, implementation plan, training plan, and transition plan
- Vendor will present project plan to SCG for review and approval

#### **Design Phase:**

- Work with SCG to gather requirements and establish metrics
- Create site design based on collected requirements
- Develop site design proposal for SCG review and approval
- Present written status at weekly meeting

#### **Build Phase:**

- Vendor will complete all coding for approved site design
- Vendor will provide SCG with a detailed testing plan
- Vendor will include all content provided by SCG on redesigned web site
- Vendor will conduct testing in both their iLab as well as in a limited beta release
- Vendor will resolve any coding and site issues identified in testing
- Vendor will compile a testing report to present to SCG for review/approval
- Present written status at weekly meeting

#### **Implementation Phase:**

- Vendor will implement the newly redesigned web site on SCG servers
- Vendor will begin providing 24x7 web site support at this point forward until the end of the period of performance
- Present written status at weekly meeting

#### Training Phase:

- Vendor will provide training in accordance with approved training plan provided in the kickoff
- Present written status at weekly meeting

#### Project Handoff/Closure:

- Vendor will provide SCG with all documentation in accordance with the approved project plan
- Vendor will present project closure report to SCG for review and approval
- Vendor will complete the project requirements checklist showing that all project tasks have been completed
- Vendor will conclude 24x7 web support at 11:59pm on the final day of the period of performance
- Present written status at weekly meeting

### **ENHANCED APC FACULTY LOADING SYSTEM:**

As part of the Enhanced APC Faculty Loading System the quality assurance/control will be responsible for monitoring every task throughout various stages of this project.

#### Management:

- Project Manager will create and present detailed project plan including schedule, WBS, testing plan, implementation plan, training plan, and transition plan
- Project team will present project plan to adviser/client for review and approval
- Quality assurance/control will check if this step was completed

#### Research Phase:

- Systems research will work with adviser/client to gather information needed for the project
- Systems researcher will create document (project context, purpose and description, objectives, scope and limitations, related studies and related systems)
- Present written document to adviser/client at weekly meeting
- Quality assurance/control will check if this step was completed

#### Design Phase:

- Systems developer and systems designer will work with adviser/client to gather requirements
- Systems developer and systems designer create site design based on collected requirements
- Systems developer and systems designer develop site design proposal for adviser/client review and approval

- Present prototype proposal to adviser/client at weekly meeting
- Quality assurance/control will check if this step was completed

## Build Phase:

- Systems developer and systems designer will complete all coding for approved site design
- Systems developer will provide adviser/client with a detailed testing plan
- Systems developer will include all information provided by adviser/client on redesigned web site
- Systems developer will conduct alpha testing
- Systems developer will resolve any coding and site issues identified in testing
- Systems developer will compile a testing report to present to adviser/client for review and approval
- Conduct beta testing of system proposal to adviser/client at weekly meeting
- Quality assurance/control will check if this step was completed

## Implementation Phase:

- Systems developer will implement the newly redesigned web site on adviser/client servers, if approved
- Systems developer will begin providing 24x7 web site support at this point forward until the end of the period performance
- Present status to adviser/client at weekly meeting
- Quality assurance/control will check if this step was completed

## Training Phase:

- Systems analyst and systems developer will provide training with adviser/client
- Quality assurance/control will check if this step was completed

## Project Handoff:

- Systems analyst and systems researcher will provide adviser/client with all documentation in accordance with the approved project plan
- Project Manager will present project closure report to adviser/client for review and approval
- Quality assurance/control will complete the project requirements checklist showing that all project tasks have been completed
- Systems developer will conclude 24x7 web support at 11:59pm on the final day of the period of performance
- Present status to adviser/client at weekly meeting

## SCHEDULE/MILESTONES

This section should define the schedule of deliverables and milestones for this project. Since the SOW often accompanies the RFP for the project, it is imperative that all milestones, tasks, and

schedule information are as accurate as possible since vendors will need to consider these items in their proposals.

**EXAMPLE:**

The below list consists of the initial milestones identified for the Website Redesign Project:

RFP/SOW Release	January 2, 20xx
Vendor Selection Review	February 1-28, 20xx
Vendor Selection	March 1, 20xx
Period of Performance Begins	March 2, 20xx
Website Design Review	August 31, 20xx
Website Implementation Review	November 30, 20xx
Implementation Complete	December 31, 20xx
Training Complete	February 20, 20xx
Project Completion Review	February 25, 20xx
Project Closure/Archives Complete	March 3, 20xx

**ENHANCED APC FACULTY LOADING SYSTEM:**

The below list consists of the initial milestones identified for the website redesigned project:

Project planning	January 11, 2016
Conduct interviews to client	February 1-28, 2016
Research for related literature	March 1-15, 2016

**ACCEPTANCE CRITERIA**

This section defines how the customer will accept the deliverables resulting from this SOW. The acceptance of deliverables must be clearly defined and understood by all parties. This section should include a description of how both parties will know when work is acceptable, how it will be accepted, and who is authorized to accept the work.

**EXAMPLE:**

For the Website Redesign Project the acceptance of all deliverables will reside with SCG's Vice President of Marketing. The VP of Marketing will maintain a small team of three advisors in order to ensure the completeness of each stage of the project and that the scope of work has been met. Once a project phase is completed and the vendor provides their report/presentation for review and approval, the VP of Marketing will either sign off on the approval for the next phase to begin, or reply to the vendor, in writing, advising what tasks must still be accomplished.

Once all project tasks have been completed, the project will enter the handoff/closure stage. During this stage of the project, the vendor will provide their project closure report and project task checklist to SCG's VP of Marketing. The acceptance of this documentation by SCG's VP



of Marketing will acknowledge acceptance of all project deliverables and that the vendor has met all assigned tasks.

Any discrepancies involving completion of project tasks or disagreement between SCG and the chosen vendor will be referred to both organizations' contracting offices for review and discussion.

## **ENHANCED APC FACULTY LOADING SYSTEM:**

For the Enhanced APC Faculty Loading System project, the acceptance of all deliverables will reside with adviser/client's project manager. The project manager will maintain a small team of 4 people in order to ensure the completeness of each stage of the project and that the scope of work has been met. Once a project phase is completed and the systems analyst provides his report/presentation for review and approval, the project manager will either sign off on the approval for the next phase to begin, or reply to the quality assurance/control, in writing, advising what tasks must still be accomplished.

Once all project tasks have been completed, the project will enter the handoff/closure stage. During this stage of the project, the quality assurance/control will provide a project closure report and project task checklist to adviser/client's project manager. The acceptance of this documentation by the project manager will acknowledge acceptance of all project deliverables and that the project team has met all assigned tasks.

Any disagreements involving completion of project tasks or disagreement between adviser/client and the project team will be referred to both organizations' contracting offices for review and discussion.

## **OTHER REQUIREMENTS**

Any special requirements, such as security requirements (personnel with security clearance and what level, badges, etc.) should be described in this section. There should also be a description of any IT access restrictions/requirements or system downtime/maintenance if required.

## **EXAMPLE:**

All vendor project team members will submit security forms to SCG for clearance and access badges to the facility. All vendor programmers and quality control team members will be granted access to SCG servers and all necessary IT functions. They will also be given temporary SGC accounts which are to be used only for work pertaining to the Website Redesign Project. Upon completion of the project these accounts will be closed.

All programming and testing will be done in the iLab. A network outage will be scheduled for the implementation phase of this project. Prior to the network outage, all servers will be backed up and a notification will be distributed to all users.

## **ENHANCED APC FACULTY LOADING SYSTEM:**

The Enhanced Faculty Loading System will only be accessed inside the school. But if approved by the Registrar, HR, and ITRO, it can grant external access.

If the project is approved, there should be a discussion on what servers to use and who can view this module in APC's information system – Flavio System.

## **ACCEPTANCE**

Approved by:

Date: October 12, 2016

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and Information Technologies

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