**Statement of Work**

**[Agency Name]**

**[PROJECT NAME]**

[Publish Date]

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# Using this Template

This template contains “suggested language” and assumes that the author of this document will make appropriate additions, deletions, and changes for their specific project needs.

To create a document from this template:

* Replace [bracketed text] on the cover page, in the header, and throughout the document with your project and agency information by filling in the [bracketed text] area in the document text. Filling in the information once will propagate that field throughout the document.
* Complete the entire template making all necessary adjustments.
* Each section contains abbreviated instructions (**Green Font**) and an example using (**Black Font**).
* Delete this “Using This Template” page.
* Update the Table of Contents by clicking on the “References” tab, selecting “Update Table”, then “Update Entire Table” and click “Ok”.
* Save.

To provide any suggested improvements or corrections, please email [TBSM.info@tn.gov](mailto:TBSM.info@tn.gov).

| Revision | Description of Change | Author | Effective Date |
| --- | --- | --- | --- |
| v1 | Initial document upload to TBSM intranet site | BSD Team | 09/28/12 |
| v2 | Revisions, corrections (TOC, auto-populate field) | BSD Team | 10/08/12 |
|  |  |  |  |

# 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. Typically the SOW is used to document the work being performed for the State agency by an external vendor. 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 the vendor to familiarize their organization with the project.

The [Agency Name] has recently approved the [Project Name] in support of its strategic plan to enhance marketing and customer service. In order to provide more timely feedback to prospective clients and to improve customer interaction, the [Project Name] 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 [Agency Name] utilizes its web site as a platform for communicating new developments, client testimonials, recent news, and other industry specific information. [Agency Name] 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, [Agency Name] has chosen to outsource the design, testing, implementation, and training for the new website. [Agency Name] anticipates that its new website will move the company forward in its multi-tiered approach to winning new clients and capturing additional market share.

# Scope of Work

This section should provide a brief statement of what accomplishments are expected 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.

The scope of work for the [Project Name] includes all planning, execution, implementation, and training for a new public-facing internet site for [Agency Name]. The selected vendor will be responsible for the design of the new website based on feedback to be provided by [Agency Name]. Each stage of the project will require approval from [Agency Name] 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 [Agency Name] 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 [Agency Name] internal intranet site.

# 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.

The period of performance for the [Project Name] 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 [Agency Name] and the vendor contracting officers for review and discussion.

# 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 the 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.

For the [Project Name], the selected vendor will perform the majority of the work at its own facility. Selected members of the vendor project management team will be required to meet at [Agency Name]’s facility once per week (day and time TBD) for a weekly status meeting. Additionally, all project gate reviews will be held at [Agency Name]’s facility and attended by the vendor project management team. [Agency Name] will provide and arrange for meeting spaces within its facility for all required project meetings. Once the project reaches the training phase, all training will be conducted at [Agency Name] facility.

# 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.

As part of the [Project Name], the vendor project team will be responsible for performing tasks throughout various stages of this project. The following is a list of the vendor tasks required for the successful completion of this project:

Project Kickoff

* Create and present detailed project plan including schedule, WBS, testing plan, implementation plan, training plan, and transition plan
* Present project plan to [Agency Name] for review and approval

Design Phase

* Work with the [Project Name] team to gather requirements and establish metrics
* Create site design based on collected requirements
* Develop site design proposal for [Agency Name] review and approval
* Present written status at weekly meeting

Build Phase

* Complete all coding for approved site design
* Provide [Agency Name] with a detailed testing plan
* Include all content provided by [Agency Name] on redesigned web site
* Conduct testing in both the development lab, as well as in a limited beta release
* Resolve any coding and site issues identified in testing
* Compile a testing report to present to [Agency Name] for review/approval
* Present written status at weekly meeting

Implementation Phase

* Implement the newly redesigned web site on [Agency Name] servers
* 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

* Provide training in accordance with approved training plan provided in the kickoff
* Present written status at weekly meeting

Project Handoff/Closure

* Provide [Agency Name] with all documentation in accordance with the approved project plan
* Present project closure report to [Agency Name] for review and approval
* Complete the project requirements checklist showing that all project tasks have been completed
* Conclude 24x7 web support at 11:59pm on the final day of the period of performance
* Present written status 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.

The list below contains 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

# 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.

For the [Project Name] the acceptance of all deliverables will reside with [Agency Name]’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 Project Manager, 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 selected vendor will provide their project closure report and project task checklist to [Agency Name]’s VP of Marketing. The acceptance of this documentation by [Agency Name]’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 [Agency Name] and the selected vendor 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.

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

All programming and testing will be done in the development lab. 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.

# acceptance

(This section should be modified for best application to specific projects. Include all project team members that should have some level of authority regarding document review and approval.)

Approved by:

Date:

<Approvers Name>

[Project Name] Executive Sponsor

Date:

<Approvers Name>

[Project Name] Business Sponsor

Date:

<Approvers Name>

[Project Name] Project Director/Manager

Date:

<Approvers Name>

[Project Name] Stakeholder