

# Instructions and Guideline for Completing the Design Template Statement of Work (SOW)

Instructions: The template must be edited or information added in order to develop a complete Statement of Work (SOW).

If a task is not required for the project, delete the entire text for that task from the final SOW (i.e. if you don't need Market Research, delete that task). The task descriptions are intended to establish a high level of quality and ensure a minimum level of service is provided. The task descriptions should not be edited, (except where noted), as it could result in a loss of service or end product quality.

In the template, the text in gray provides guidance, suggestions or explains the content required to complete template. Complete all the blanks and delete the gray text areas for final version for issue.

Many of the blanks are self-explanatory. The following instructions provide more detailed guidance and direction.

## Page 1

Fill-in the blanks for the **DATE**, **PROJECT IDENTIFICATION** and **PROJECT BACKGROUND**. Give a brief history stating why the project was initiated, any schedule constraints or other outside influences that could affect the project.

Complete the **PROJECT DESCRIPTION** section by checking the tasks required (see task definitions on page 4 of instructions). Include the estimated area in square feet and the number of FTE included in the project. If contractors, part-time employees or other employee classifications (i.e. interns summer hires, etc.) require workspace, then include them in the staff totals.

List any **OBJECTIVES** that may be desired including: improving aesthetics, acoustics, providing visual privacy, long-term adaptability to change, layout flexibility, consultation/coordination with other specialists or entities, security needs, philosophical approach, project protocol/conduct, product re-use or product selection that will collect points for LEED certified projects.

## Page 2

State the address where the project is located in the **PLACE OF PERFORMANCE**. If the contractor must perform the work at the government's workplace, state that expectation and include the address.

### GOVERNMENT FURNISHED EQUIPMENT

The government may provide materials to the contractor after contract award to assist with the project. List reports, studies, drawings or other documentation provided by the government to the contractor to aid accomplishing the work. Provide dates for the documents. List any equipment, fixtures or furnishings provided. List any products the

government will furnish as part of the project that the contractor must work with or coordinate within the context of the project scope. If performance on the government's site is required, list the amenities/constraints the government will provide to support the contractor's work: i.e. workstation, phone, computer, network access, security restrictions, non-disclosure agreements, etc.

## **PERIOD OF PERFORMANCE**

List specific milestones/deadlines for specific tasks to be completed. Use actual dates if appropriate or durations. If using durations, use "X" weeks after the previous task's approval and sign-off. Explain short deadlines and why the deadline is short. Allow the contractor to offer time-saving solutions.

The listing of submittals is typically included in the Request for Quote (RFQ) document and is not in the SOW; however, you should list the total days the Government plans to use for review of documents submitted. The minimum review time should be 5 working days. If a group must review, and comments consolidated into one "official" response, then allow for 10 working days, or more. After the review, the contractor will have a defined number of work days to revise and resubmit, if ordered by the Government. Again, the RFQ document issued by the Government should contain specifics of the resubmitted documents and periods of review. Typically, the RFQ allows the quoted vendor three working days to revise meeting minutes and correspondence, and five working days for drawings and reports. If the revision requires survey work or additional research you may later discuss the time required for the revisions and allow a reasonable time for the contractor to make the changes. Allow 10 working days for revisions that require additional site visits, surveys or research.

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## **SECURITY AND CONFIDENTIALITY**

If the contractor and contractor personnel must comply with security and non-disclosure requirements, list or describe the requirements here. Include any non-disclosure agreement documents or restrictions in the information provided by the government. If the contractor must submit to any security screening, list the pass/fail requirements for the security screening.

## **PRICING**

The contractor shall provide a fee for the required services using the format shown. By restricting the pricing format and pricing by task, this allows for a clear comparison of hours and rates by task.

The contractor shall provide totals for hours and fee per labor category at the bottom of the chart. The contractor shall list deliverables and provide pricing for deliverables/reimbursables by task.

Require the contractor to describe how they will structure a team for the project, the skills on the team and the approach to managing and accomplishing the work.

List the professional experience that is required for this project. Make the experience relevant to the scope, complexity and scale of the project. List professional certifications or accreditations deemed necessary by the individuals leading the project.

## **SOW TASKS**

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#### **TASK A: MARKET RESEARCH**

This task is useful for government agencies that have not purchased furniture recently or do not have any knowledge of current furniture types, capabilities and trends. Conducting market research allows the government to inspect furniture capabilities and identify desired features that may form the basis of a performance specification.

Please note the requirement for market research under FAR 8.602. Review the reference for it is likely to affect your overall procurement action. Meet with your procurement specialist or contracting officer to develop a strategy to manage the market research effort.

#### **TASK B: PROJECT SCHEDULE**

Allow the contractor 5 working days, (10 working days for larger complex projects) after the project kick-off meeting to submit a project schedule. The government must decide to limit the schedule scope, i.e. only the tasks listed in the template and resulting SOW or expand the task to cover subsequent design, installation and move tasks. Each task will be assigned a start/end date.

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#### **TASK C: PROJECT BUDGET**

Allow the contractor 20 working days to develop a budget. Often other sources must be contacted for accurate figures. If the time is too short, the number will not be accurate. The budget will only reflect costs related to furniture and furnishings.

#### **TASK D: FURNISHINGS TECHNICAL PACKAGE**

If your project objective is to provide your procuring officer the documents necessary to start a procurement action, this task includes the three parts necessary. Include this task in total, do not delete any portion of the tasks.

Note that finishes are part of this task. The finishes shall be used to assist with the pricing, by determining if the desk tops are wood or plastic, panels are fabric or metal, chair coverings are leather or fabric. Convey to all the governments' team the selections are not the final selections, but are needed to get accurate pricing.

The finish selections are used as a guide to subsequent design decisions regarding materials, colors and finishes for the new interior. The finishes help determine the offerors' pricing by establishing finish materials for the furniture (wood, laminate, etc.) and fabric grades.

It is not necessary or desired to develop a "typical workspace" for every unique condition. The typical workspaces should represent the overall majority of workstations by functional requirement. Adding typical workspaces to accommodate columns or unique functional requirements for one or two occurrences is not required. Ideally, typical workspaces are designed to accommodate some flexibility in the use and assignment.

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### **TASK E: SPACE PROJECTION**

If the government has not established a total space requirement, this task may be used to estimate the required useable area for the government's work. The task cannot be used for a lease acquisition. It will provide an accurate count for workspace typicals if none exists.

Use this task for quick space needs assessments where a in-depth analysis of the functional requirement is not necessary. This task will help identify quantities of staff and support space if a program document is not available.

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### **TASK F: SPACE PLANNING**

This task will illustrate the future plan layout, showing how the typicals developed under Task 4 will be arranged. For larger spaces Block Plans should be submitted to determine adjacencies. This task is a progressive effort, meaning that each step builds upon the last step. The government should carefully consider the process and know that requirement changes during this phase could result in a request for additional fees from the designer.

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### **SELECTION/EVALUATION CRITERIA**

Include this section to convey to the contractor what evaluation criteria are important to the government.

The contractor will be evaluated on a "Best Value" basis, considering the proposed project approach, a demonstrated understanding of the project's requirements and relevance of the company's and key personnel's past experience.

Require the offerors to submit their proposals in the same format and information sequence. This allows for a more easily conducted evaluation and comparison.

If there are specific evaluation criteria that will be used to select the contractor, list the criteria. They may include:

- Key personnel by role/position that the contractor must provide to accomplish the work

- Experience levels appropriate for the project for all key personnel
- Professional associations, registrations or accreditations that constitute industry standard Levels of competency for key personnel that the key personnel must have
- Specific areas of expertise that key personnel must have such as LEED accreditation
- Define the time commitment to the project expected from the government/customer)