Appendix A:

Scope of Work

[Remove red text areas prior to submitting.]

The Scope of Work (SOW) is the area in an agreement or grant proposal where the work to be performed is described. It contains any measurable objectives, specific deliverables and associated timeline. It is critical to establish a strong Scope of Work prior to project commencement to ensure there is no ambiguity regarding what is to be expected, when, and in what form. A Strong Scope of Work is specific, detailed and outlines any special requirements of the relationship.

Components:

1. Glossary

[Spell out each acronym used in the SOW. Include definitions of any uncommon terms that are unfamiliar to someone not in that field of research.]

1. Problem Statement

Describe the problem that the research will address (1-2 paragraphs). Describe the current status of the field/project to be advanced. Describe the need for the intended work and how it will address existing gaps in knowledge, service, etc.

1. Goals

[State the goal(s) and provide a brief description. How will the goals be met? This section can be brief, three sentences maximum.]

The goal of this project is to \_\_\_\_\_\_\_\_

1. Objectives and Deliverables

[Include a description of the project objectives and deliverables for the service provider. Objectives are items that will be measurable and known at the end of this agreement. Deliverables consist of a task and an end product:

Example:

**Objective**: This Scope of Work includes water quality assessments of four lakes (Lake A, Lake B, Lake C, Lake D) within Northeast Wisconsin region. A water quality analyst will travel from UW Oshkosh to each lake twice during the field season from May 1-September 30, 2018. Each trip will result in 25 water samples per lake (25 samples x 2 trips x 4 lakes = 200 water samples)

**Deliverable**: Fifty (50) water samples per lake (50 samples x 4 lakes= 200 samples) will be collected by September 30, 2018. A water quality assessment report will be completed for each lake to show current water quality standings for each lake. The assessments reports in addition to a final report and invoice for work will be submitted by October 31, 2018.

The deliverables should have enough detail so that there is no confusion about what is expected of the performing party. A SOW may contain many deliverables. Each should be broken down into an objective and end product (deliverable) in order to specify what is expected.]

1. Administration

[Include information on any “soft” deliverables, such as meetings, conference calls, conferences, etc. If it is an administrative requirement of the performing party then it should be included in this section. Include information on requirements for reporting and invoicing frequency.]

Example:

The PI will provide a water quality assessment report for each lake to the client by October 31, 2018. The report will describe quality analysis metrics, sample location, turbidity, E. coli ppm, Secchi depth at collection point, and water temperature at collection point. The PI will attend a once per month conference call with the sponsor contact listed on Page 2 of the Standard Services Agreement during the field season from May 1-September 30, 2018. The sponsor’s call schedule is listed on page 2 of the SSA. A final report summarizing the water quality assessment findings will be submitted to the sponsor by October 31, 2018.

1. Timeline

[This section provides the dates for the project. State the dates for objectives and deliverables. Provide the dates for any Administration duties.]

|  |  |  |
| --- | --- | --- |
| Date | Objective | Deliverable |
|  |  |  |